Interactive Voice Response Installation and Configuration Guide

BCM 4.0

Business Communications Manager

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Chapter 1
Getting started

About this guide

This guide leads a system administrator through installing and configuring the Interactive Voice Response (IVR) application on a Business Communications Manager (BCM) system.

IVR is an automated telephony application that prompts callers with a combination of recorded menus and prompts, and provides callers with real-time data from databases. Users enter digits from their touchtone keypad that direct the IVR application to access databases and play information back to the caller.

IVR is a call-handling system that allows employees to perform their jobs, and agents to make sales, rather than answer frequently asked questions. IVR can distribute calls, make announcements, and give callers access to relevant information from dynamic databases 24 hours a day, 7 days a week. This chapter contains:

- About this guide
- Audience
- Acronyms
- Symbols and text conventions
- Related publications
- How to get Help

Audience

This guide is intended for use by BCM 4.0 Administrators and Installers who want to install IVR on their BCM 4.0 system. This guide is also intended for IVR users.

Acronyms

The following is a list of acronyms used in this guide.

Table 1

Acronym	Description
BCM	Business Communications Manager
BRU	Backup and restore utility
IVR	Interactive Voice Response
JRE	Java Runtime Environment
MMDP	MPS Manager Data Provider

Symbols and text conventions

These symbols are used to Highlight critical information for the BCM system:

Caution: Alerts you to conditions where you can damage the equipment.

Danger: Alerts you to conditions where you can get an electrical shock.

Warning: Alerts you to conditions where you can cause the system to fail or work improperly.

Note: A Note alerts you to important information.

Tip: Alerts you to additional information that can help you perform a task.

Security note: Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.

Warning: Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.

Warning: Alerts you to remove the BCM main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

These conventions and symbols are used to represent the Business Series Terminal display and.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	PLAY	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

These text conventions are used in this guide to indicate the information described:

Convention	Description
bold Courier text	Indicates command names and options and text that you need to enter. Example: Use the **info** command. Example: Enter **show ip** {**alerts**|**routes**}.
italic text	Indicates book titles
plain Courier text	Indicates command syntax and system output (for example, prompts and system messages). Example: `Set Trap Monitor Filters`
FEATURE HOLD RELEASE	Indicates that you press the button with the coordinating icon on whichever set you are using.

Related publications

This document refers to other related publications, which appear in the following list. To locate specific information, you can refer to the *Master Index of BCM 4.0 Library.*

BCM 4.0 Administration Guide (N0060598)

BCM 4.0 Configuration Guide (N0060600 01)

BCM 4.0 Device Configuration Guide (N0060600)

Keycode Installation Guide (N0060625)

CallPilot Manager Set Up and Operation Guide (N0027247)

Media Processor Server Series COMMGR Reference Manual

BCM -IVR Integration Supplement

PeriReporter User's Guide

How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Chapter 2
Installing Interactive Voice Response

This chapter contains the information and procedures shown in this list:

- Overview of installing IVR
  - Hardware and software requirements
  - IVR capacities
- Enabling IVR
- Administering several IVR systems
- Installing PeriView
  - Before you install PeriView
  - PeriView 2.1 and PeriView 2.1 Consolidator installation
- Adjusting the number of voice ports
- Uploading IVR prompts
- Installing the client database software
- Configuring host access
  - Enabling the Host Communication Access keycode
- Launching an application in PeriView
- Dialing the IVR extension
- Assigning lines to IVR

Overview of installing IVR

To install IVR you must know how to:

- log on to Element Manager and use the Element Manager interface

  Refer to the *BCM 4.0 Administration Guide* (N0060598) for more information.

- log on to CallPilot Manager and use the CallPilot Manager interface

  Refer to the *CallPilot Manager Set Up and Operation Guide* (N0027247) for more information.

- use PeriView

  Refer to your PeriView system documentation for more information.

Hardware and software requirements

To install PeriView you must have:

- a computer that runs Windows 2000

IVR capacities

Maximum number of simultaneous calls	24 (24 voice ports)
Maximum number of voice ports	32
Maximum number of voice ports that can be allocated to voicemail	32
Maximum number of IVR fax calls	2
Maximum number of fax ports	2
Recording time available on Business Communications Manager for all applications (IVR, CallPilot, and Contact Center)	200 hours

Note: There are other restrictions that can alter the real number of voice ports available on a BCM. For more information, refer to the *BCM 4.0 Configuration Guide* (N0060600 01). Voice ports cannot be shared between voicemail, Contact Center, and IVR.

To install IVR

1. Enable the IVR software authorization code.

   Refer to "Enabling IVR" on page 13.

2. If you are going to use IVR in a multinode environment, refer to "Administering several IVR systems" on page 13.

3. Install PeriView on a Windows 2000 client PC.

   Refer to "Installing PeriView" on page 15.

4. Assign voice ports to IVR.

   Refer to "Adjusting the number of voice ports" on page 24.

5. Upload IVR prompts to the BCM.

   Refer to "Uploading IVR prompts" on page 26.

6. Configure host access if your IVR scripts use host access.

   Refer to "Configuring host access" on page 28.

7 Use the PeriView Application Manager to load and configure the scripts.

Refer to "Launching an application in PeriView" on page 43 and see the *PeriView User's Guide* for more details.

8 Verify that IVR is working by dialing the IVR extension.

Refer to "Dialing the IVR extension" on page 52.

9 Use CallPilot Manager to assign the lines you want the IVR scripts to answer.

Refer to "Assigning lines to IVR" on page 52.

10 Back up IVR.

For information on how to perform backup and restore activities, refer to the *BCM 4.0 Administration Guide* (N0060598).

Enabling IVR

To enable IVR, load a BCM keycode file and IVR-specific authorization code on the BCM Element Manager. The IVR-specific authorization code enables the number of voice ports to be used by the IVR application to service scripts. This authorization code also enables fax resources that can be used by IVR scripts.

For more information and procedures on installing the BCM keycode and IVR authorization code, refer to the *Keycode Installation Guide* (N0060625).

Administering several IVR systems

If you want to use PeriView to administer several IVR systems on different BCMs, you must assign a different node number to each IVR system.

To change the node number

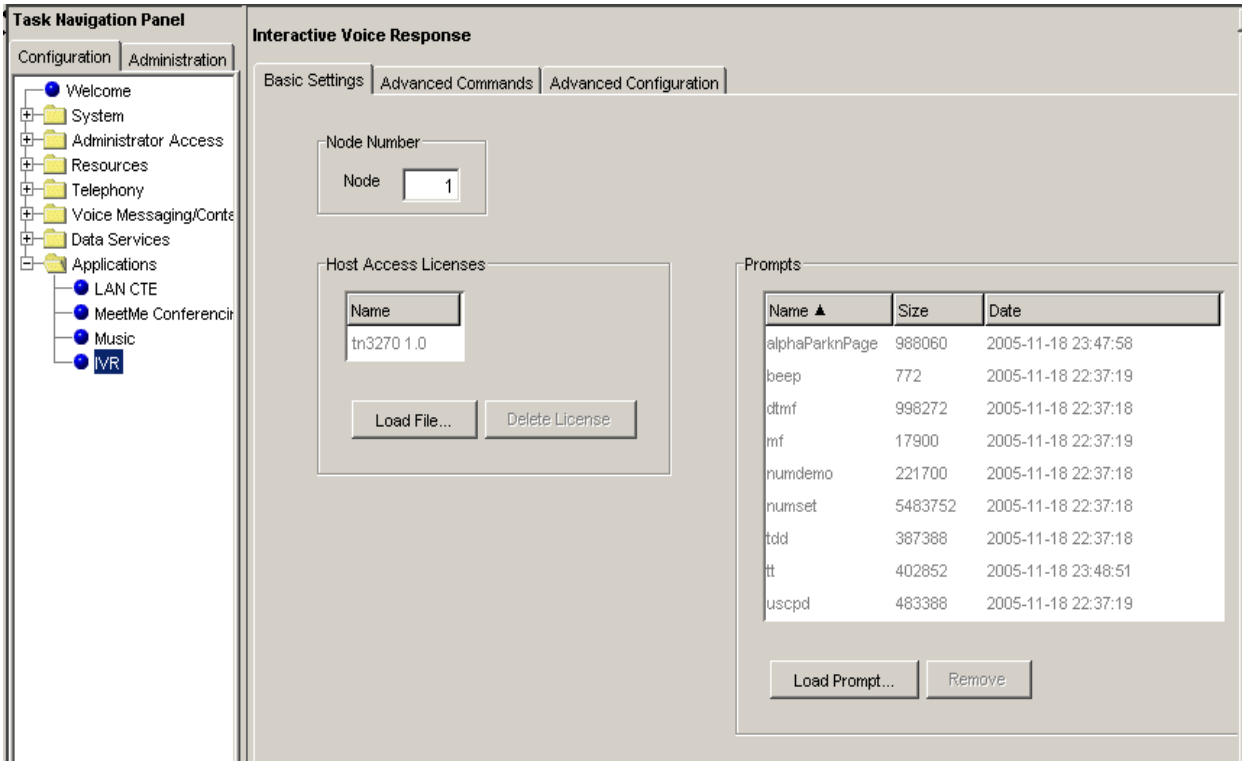
1 Launch and log on to Element Manager.

The Element Manager opens with the Task Navigation Panel showing.

2 From the **Configuration** tab, open the **Applications** folder.

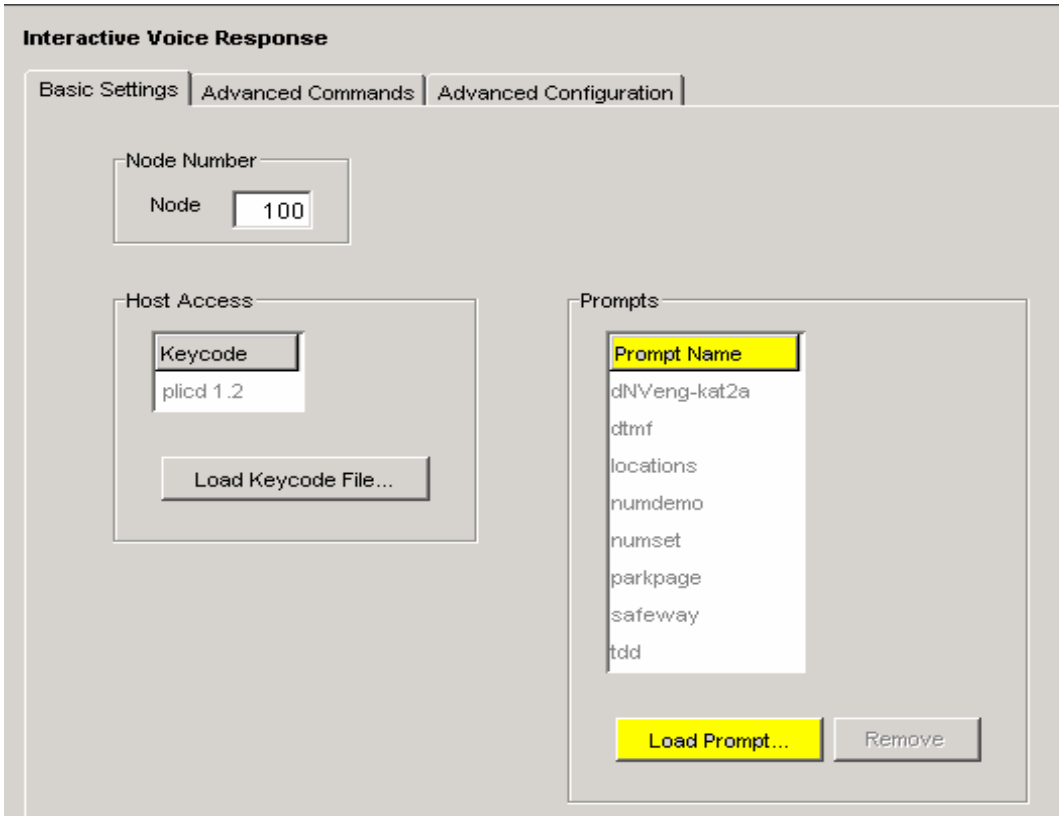
3 Click **IVR**.

The Interactive Voice Response panel opens with the Basic Settings tab showing.



4 In the **Node** field, enter a node number.

The node number is 1 by default. The node number can be between 1 and 5000.



Note: IVR restarts when you change the node number.

5 You must next install PeriView. Go to "To install BCM/IVR 2.x PeriView Consolidator".

Installing PeriView

PeriView is the IVR administrative client. Use PeriView to administer IVR scripts on your BCM. Before you can use PeriView, you must install it on a client computer.

Before you install PeriView

Ensure the following before you install PeriView:

- Order the BCM IVR 2.1 Management and IVR Tools CD Kit
- Make sure you install PeriView on a Windows 2000 PC. PeriView can be installed on Windows 2000 only.

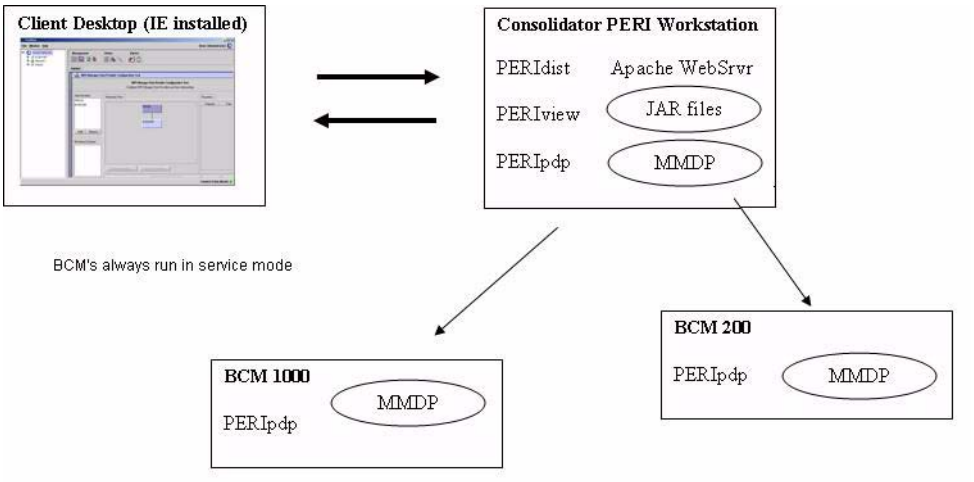
- Make sure you have administrative privileges, so that you can install services and update environment settings.
- Remove any versions of Perl currently installed on the workstation. PeriView uses a version of Perl specifically designed to work with PeriView. You must remove any other versions of Perl due to potential incompatibility with PeriView.
- Quit all active applications and Nortel or Periphonics services.
- If Windows 2000 is already installed on your system and you are running the Windows Desktop Update option (Active Desktop), deactivate this option. See the Windows 2000 online Help for instructions. Active Desktop affects color renditions in PeriView.

PeriView 2.1 and PeriView 2.1 Consolidator installation

PeriView 2.1 is an integrated systems management application suite that provides full administration and control over BCM self-service platforms. It is used by BCM/IVR 2.1 System Administrators to manipulate and view network activity and to deploy and maintain applications in the networked environment.

PeriView Consolidator is the communications hub for BCM/IVR system administration. The System Administrator remotely manages the BCM/IVR system by pointing any User PC web browser to the PeriView Consolidator workstation. The PeriView Consolidator workstation communicates with and collects data from the BCMs. The System Administrator also administers the BCM/IVR 2.1 system directly from the PeriView Consolidator workstation.

The PeriView Consolidator Workstation runs both the Apache Web Server and MPS Manager Data Provider (MMDP). The PeriView Consolidator MMDP communicates with MMDPs running on the BCMs and collects information.



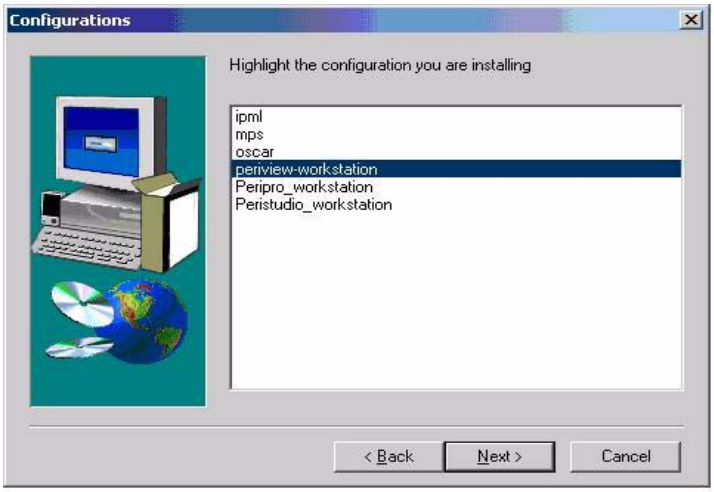
The BCM MMDPs always run in service mode. An MMDP process in service mode will allow another, higher level MMDP process (for example, the PeriView Consolidator) to establish a constant and persistent connection.

To install BCM/IVR 2.x PeriView Consolidator

1 From the *MPS 2.1 Software, Documentation and Update CD*, go to **Preinstall** and install the JAVA runtime or SDK.

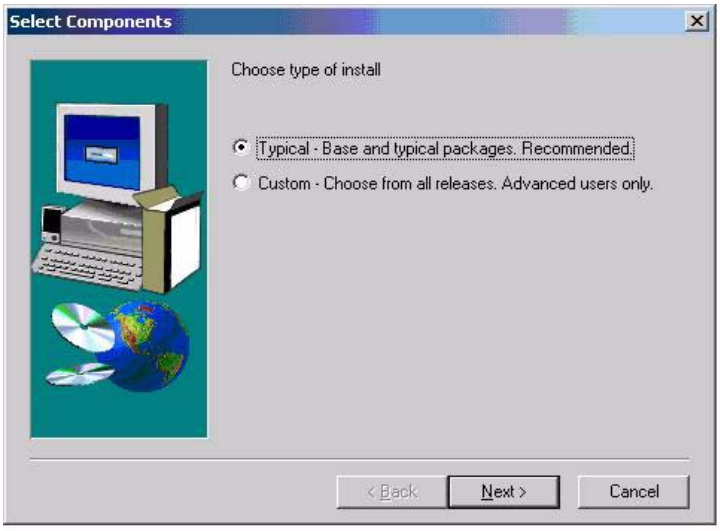
2 From the *MPS 2.1 Software, Documentation and Update CD*, go to **PERIinstaller/setup.exe**.

3 Select **PeriView-workstation**.



You are prompted to select an installation type.

4 Select **Typical**.


Select Components
Choose type of install
Typical - Base and typical packages. Recommended.
Custom - Choose from all releases. Advanced users only.
< Back
Next >
Cancel

5 Click **Yes**.

Continue?
The Typical install will use default settings where possible.
You must reboot when prompted
and there may be automatic reboots between installs.
Proceed with the Typical package install?
Yes
No

During a Typical PeriView Consolidator installation, packages are installed in the following order:

```
PERIperl > Auto Reboot > PERIfw > PERIglobl > PERIgrs > PERIppro > PERIpstu > PERIplic
> PERIrdb > PERIpdp > PeriView > Auto Reboot
```

If you are installing PeriView Consolidator on the BCM/IVR 2.1 Developer Workstation, you only need to install PERIpdp and PeriView, because the other packages will have been installed in the Periproducer and PeriStudio upgrade steps.

6 If prompted, click **Yes** to install the Apache Web Server during the PeriDist installation.

7 CLick Yes when you are prompted to install web-based PeriView during the PeriView installation.

PERIview setup
PERIview
Question
Client-based PeriView will be installed. Would you like to additionally install Web-based PeriView?
(Note that Web-based PeriView requires the PERIpdp package to be installed.)
Yes
No

Note: You may be required to stop Microsoft Internet Information Server during the installation of web-based PeriView.

8 Install any PERI service patches in the mps210 patches directory on the *MPS 2.1 Software, Documentation and Update CD*, for example, MPS2.1Patch_Bundle_9.exe.

When this window appears, patches have been successfully installed:

9 Confirm installation of PeriView and PERIpdp 2.1 from the command line by entering:

C:\>perl -S perireiv.plx outfile=STDOUT

```
C:\>perl -S perirev.plx outfile=STDOUT
. . .
PERIpdp                    2.10
                                   MPS2.1Patch_Bundle_9  BundleCutDate-20050223
                                   PkgCutDate-20030623
PERIview                   2.10
                                   MPS2.1Patch_Bundle_9  BundleCutDate-20050223
                                   PkgCutDate-20021002
```

10 In C:\Program Files\Nortel\PERIpdp\etc, back up the userdb.xml file.

11 From the BCM/IVR Toolkit CD, copy the file userdb.xml.BCM to overwrite C:\Program Files\Nortel\PERIpdp\etc\userdb.xml.

The userdb.xml.BCM file contains the administrative plugins required for BCM/IVR management.

12 Restart Apache and PDP services.

13 Ensure PeriView Consolidator host name appears in C:\Program Files\Nortel\PERIpdp\etc\mmdp.cfg.

Apache2 Apache/2.... Started Automatic LocalSystem
Nortel Networks License Service Started Automatic
Nortel Networks PeriView Data Provider Started Automatic
NT LM Security Support Provider Provides s... Manual
mmdpconfig=WIN2K
ipcsrpconnection=WIN2K

14 If you are managing the BCM/IVR system from a browser located outside the local host, change permissions in:

C:\ProgramFiles\Nortel\PERIdist\apache\conf\httpd.conf

```
allow from all
#
#    deny from all
_
```

15 From Services, restart the Apache web browser.

16 Ensure PeriView Consolidator is running by pointing the Apache web browser to the PeriView URL http://<Consolidator IP>/PeriView/PeriView.html.

a In the **UserID** field, enter “Administrator”.

b In the **Password** field, enter “root;”.

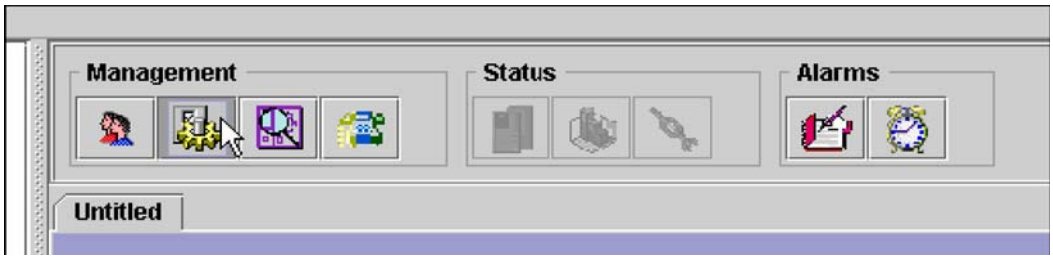
c Verify that the **Host** field contains the PeriView Consolidator IP address.

d Verify that the **Port** field contains “9191”.

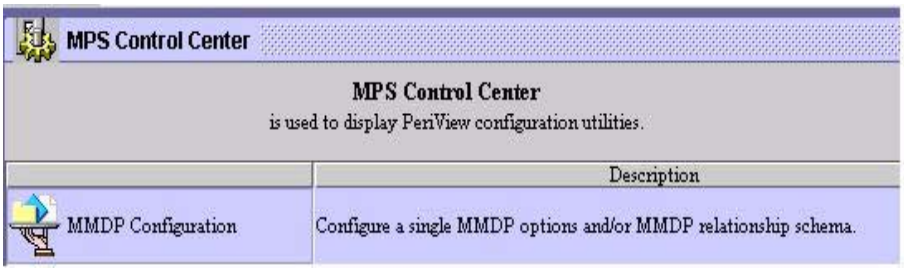
e Click **OK**.

You are logged on and ready to add the BCM nodes to the system.

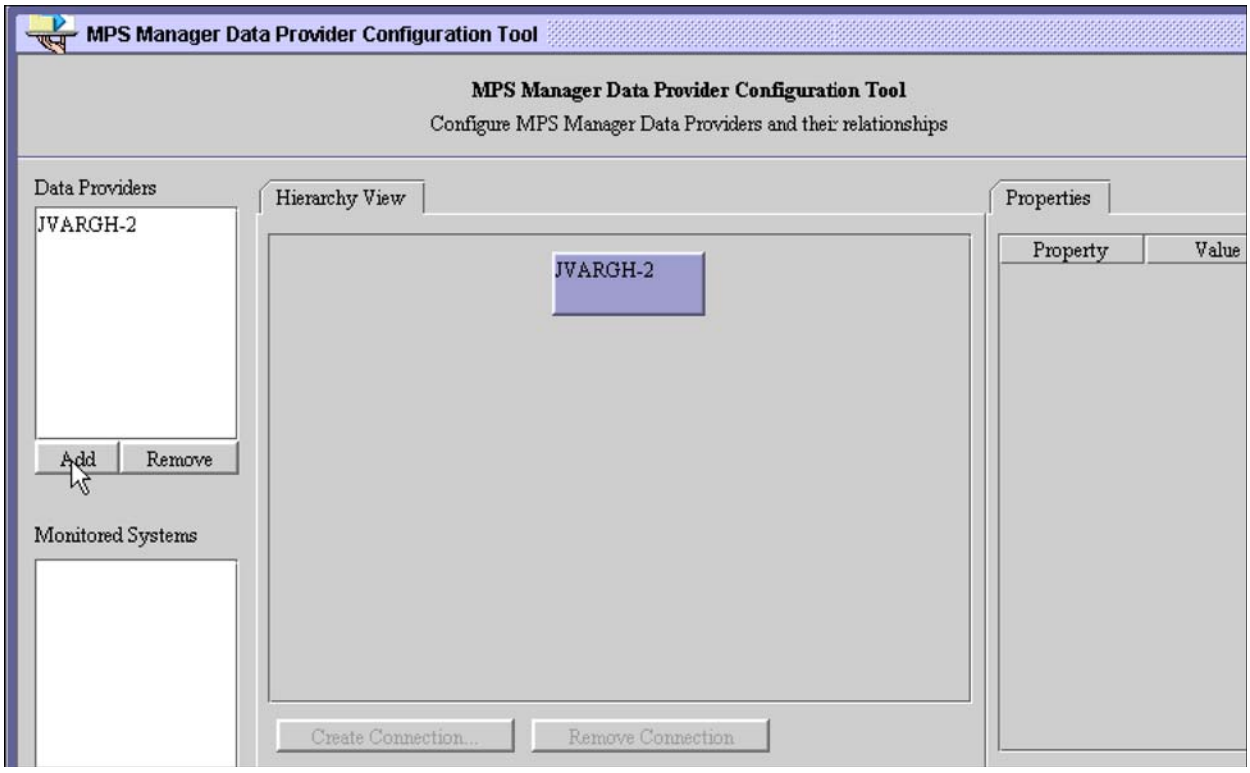
17 Click **Control Center** (the button located on the far right of the Management toolbar).



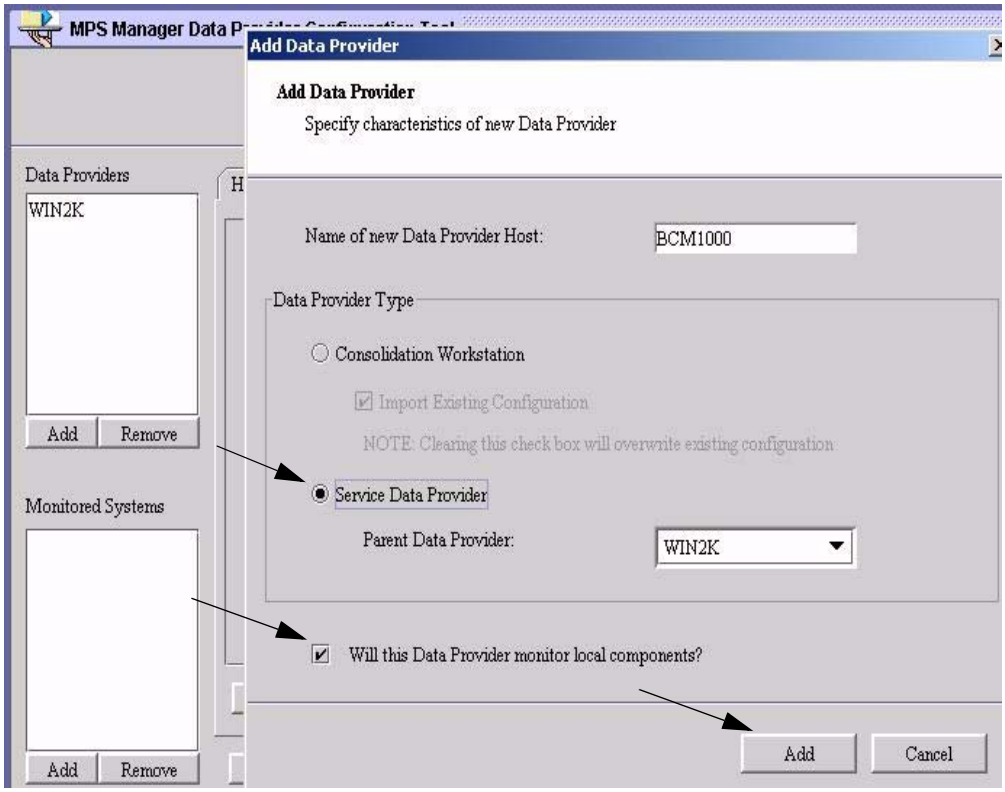
18 From the **MPS Control Center** window, select **MMDP Configuration.**


MPS Control Center
MPS Control Center
is used to display PeriView configuration utilities.
Description
MMDP Configuration
Configure a single MMDP options and/or MMDP relationship schema.

19 Click **Add** to add a data provider.



20 In the **Add Data Provider** window, enter the host name, for example, BCM1000, in the **Data Provider Name** field.



Note: To ensure the Data Provider host name translates to its corresponding IP address, make a DNS entry or place an entry in the consolidators host file:

```
C:\winnt\system32\drivers\etc\hosts
```

21 Select the BCM1000 as the Service Data Provider by checking the Service Data Provider option.

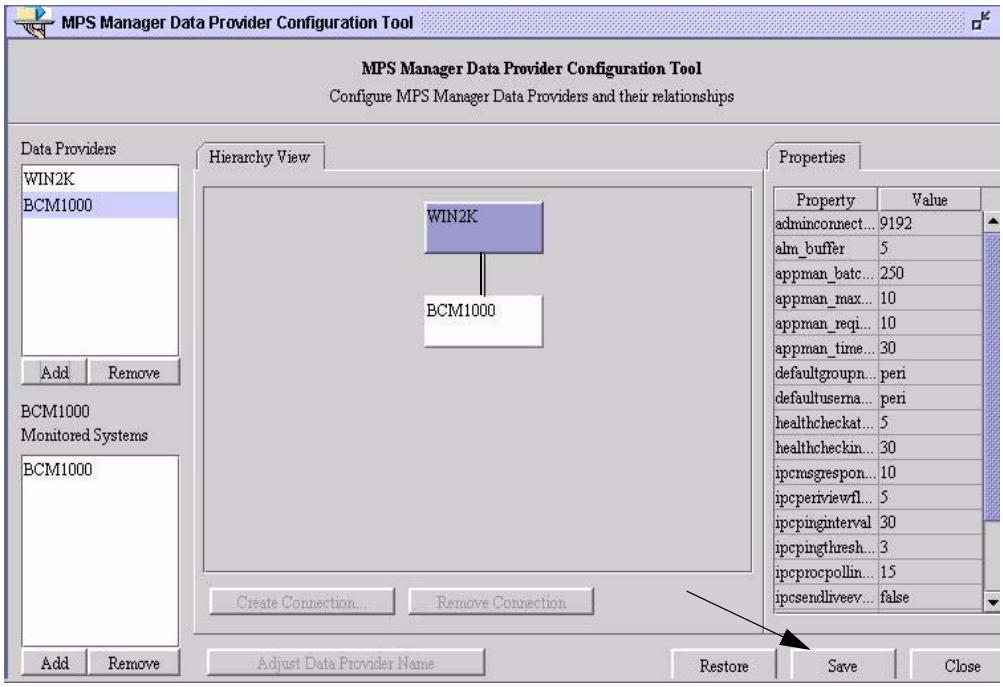
22 Select the PeriView Consolidator workstation as the Parent Data Provider.

23 At the bottom of the window, ensure that the box next to **Will the Data Provider monitor local components** field is checked.

This triggers the BCM1000 MMDP process to connect to the local srp to get state information.

24 Click **Add**.

The MPS Manager Data Provider Configuration Tool window appears, showing a hierarchy of two MMDPs. The PeriView Consolidator MMDP (for example, Windows 2000 MMDP) appears above the BCM1000 MMDP, indicating that it is the parent service provider.

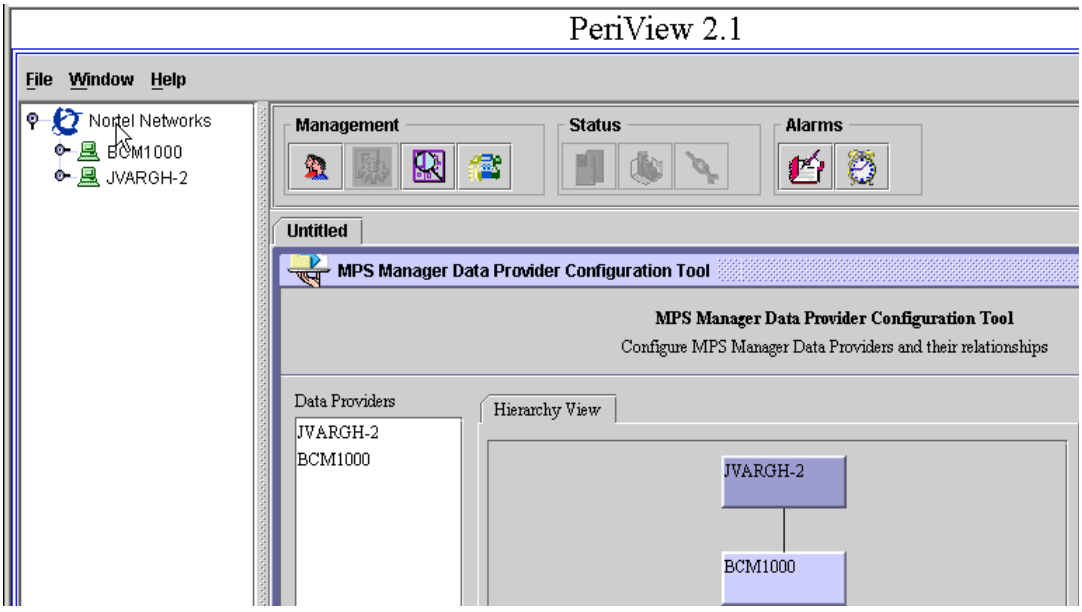


25 Select BCM1000 from the **Data Providers** pull-down list in the upper left of the window or in the hierarchy.

The BCM1000 is listed as a monitored system.

26 Click **Save**.

If the information from the preceding steps has been entered correctly, the BCM1000 IP address and node are contacted. The icons representing the BCM/IVR Service Data Providers (for example, BCM1000) turn green when a connection is established.



Adjusting the number of voice ports

You can adjust the minimum and maximum number of IVR ports. For more information about voice ports, refer to the *BCM 4.0 Network Configuration Guide* (N0060600 01).

After adjusting the minimum and maximum numbers of IVR ports, note that:

- The maximum number of simultaneous voice calls that IVR can handle is 24 (with 24 voice ports).
- The combined maximum number of voice ports for IVR, voicemail, and Contact Center cannot exceed 32.
- Fax is automatically enabled for IVR and the maximum number of fax ports is set to 2.
- The default values for IVR are the number of ports purchased for the maximum, and 2 for the minimum.

To adjust the number of voice ports

1 Launch and log on to Element Manager.

The Element Manager opens with the Task Navigation Panel showing.

2 From the **Configuration** tab, open the **Resources** folder.

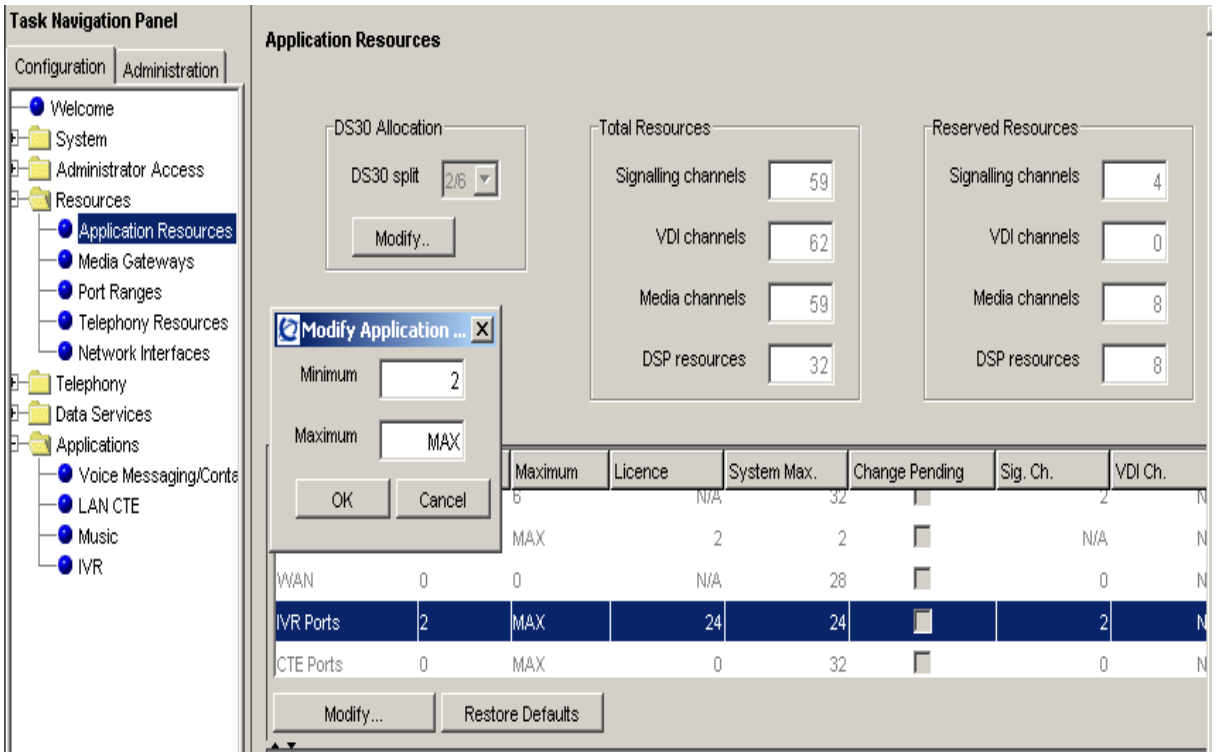
3 Click **Applications Resources**.

The Applications Resources panel opens, showing the Applications Resources Reservations table.

4 In the **Applications Resources Reservations** table, select the **IVR Ports** row.

5 Click **Modify**.

The Modify Application Resource Reservations dialog box opens.



6 Change the values in the **Minimum** and **Maximum** fields.

7 Click **OK**.

8 To change the number of fax ports, click the **Fax** line.

9 Click **Modify**.

10 Change the values in the **Minimum** and **Maximum** boxes.

Note: After you change the minimum or maximum number of IVR ports or fax ports you must reboot your system.

11 Log back on to Element Manager.

You are now ready to upload IVR prompts.

Go to "To upload IVR prompts".

Uploading IVR prompts

The steps for installing IVR prompts are similar to those for installing a keycode. Upload .mmi and .mmd files to your Business Communications Manager (BCM) system, where they are installed in the Voice File System, along with other IVR system prompt files.

When the prompts are installed, IVR restarts.

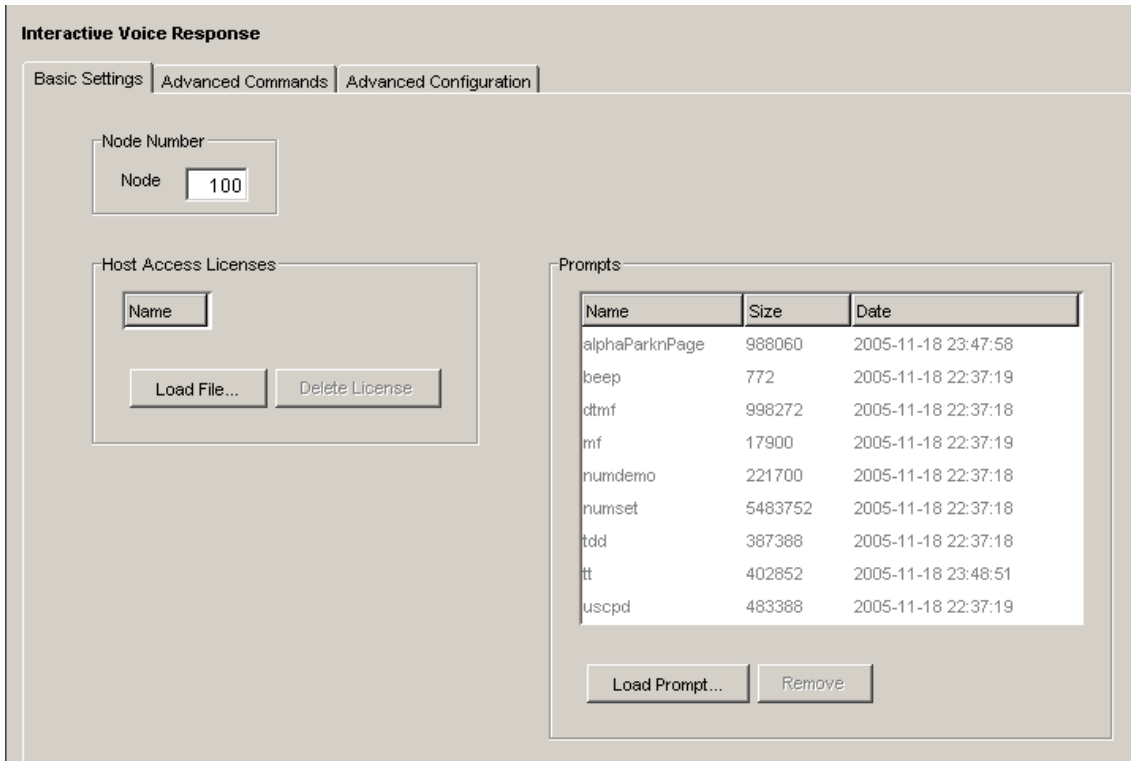
To upload IVR prompts

1 Ensure the prompts (.mmi and .mmd files) that have been created for your IVR system are available to be retrieved.

2 In Element Manager, open the **Applications** folder.

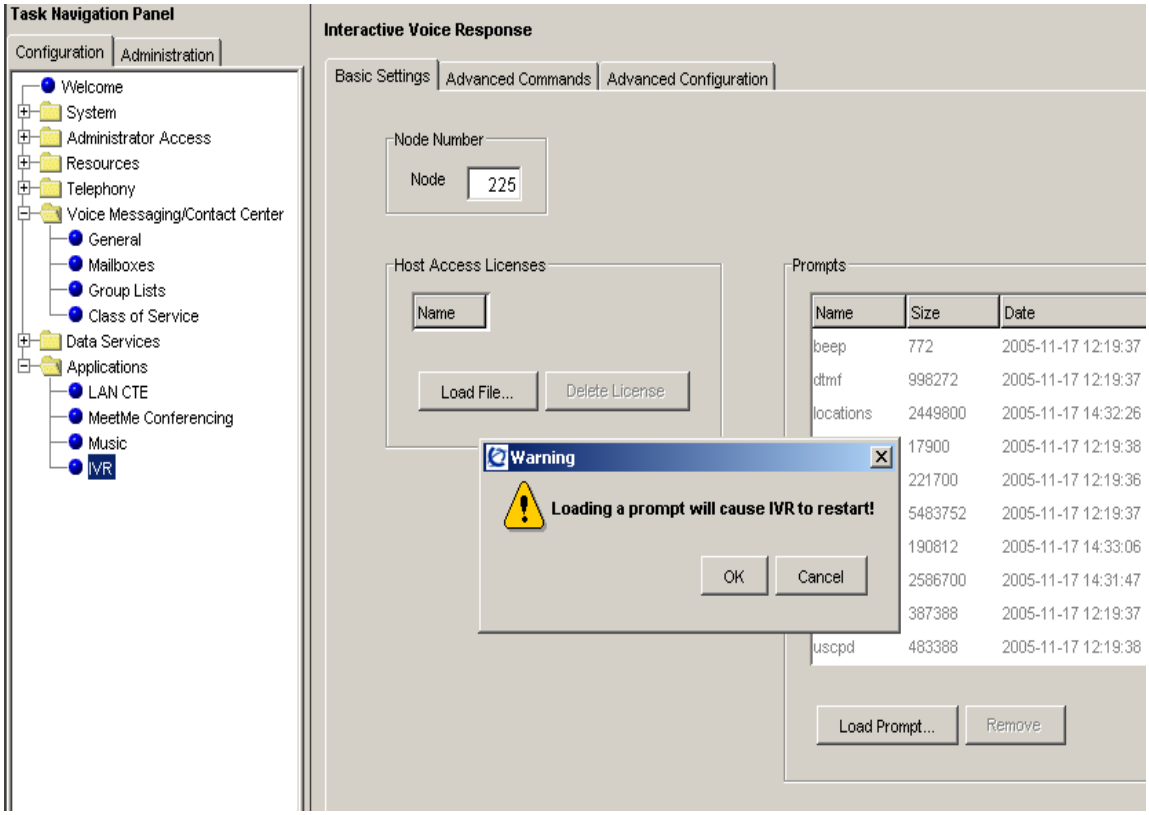
3 Click **IVR**.

The Interactive Voice Response panel opens with the Basic Settings tab showing.



4 In the **Prompts** area, click **Load Prompt**.

A message appears warning that IVR will restart after the prompt is loaded.



5 Click **OK** to continue.

A window opens in which you can specify the location of the prompt you want to upload.

6 Use the **Look in**, **File name**, and **File type** fields to navigate to the .mmi file.

Note: You must upload the .mmi first and then the .mmd file.

7 Click **Open**.

A message appears that asks you to confirm your choice.

The .mmi file uploads to the BCM.

8 Click **OK**.

9 Use the **Look in**, **File name**, and **File type** fields to navigate to the .mmd file.

10 Click **Open**.

A message appears that asks you to confirm your choice.

The .mmd file uploads to the BCM.

11 Click **OK**.

When you have transferred both the .mmi and .mmd files, the IVR service restarts.

Installing the client database software

When you install the client database software, you must configure the host access. There are two phases for configuring the host access.

Configuring host access

To configure host access

1 Enable the host communication access keycode.

Refer to "Enabling the Host Communication Access keycode" on page 28.

2 Configure host access if your IVR scripts use host access.
Refer to the *Media Processing Server Series COMMGR Reference Manual* and the *BCM-IVR Integration Supplement* for instructions on how to configure host access.

After you complete these two procedures you are ready to use PeriView, the IVR administration tool, to load and configure scripts. Go to "Launching an application in PeriView" on page 43.

For information about host access refer to the *Media Processor Server Series COMMGR Reference Manual* and the *BCM -IVR Integration Supplement*.

Enabling the Host Communication Access keycode

To enable the Host Communication Access keycode, complete the following procedure.

To enable the Host Communication Access keycode

1 Retrieve the authorization number for Host Communications from the NTKC0098 documentation kit and the order code of the feature you want to enable (for example: geotel, iex, atte).

2 Record the Medial Control Address (MAC address) of the BCM. The MAC address is a hardware address that gives a unique identification to each node of a network.

a Log on to Element Manager.

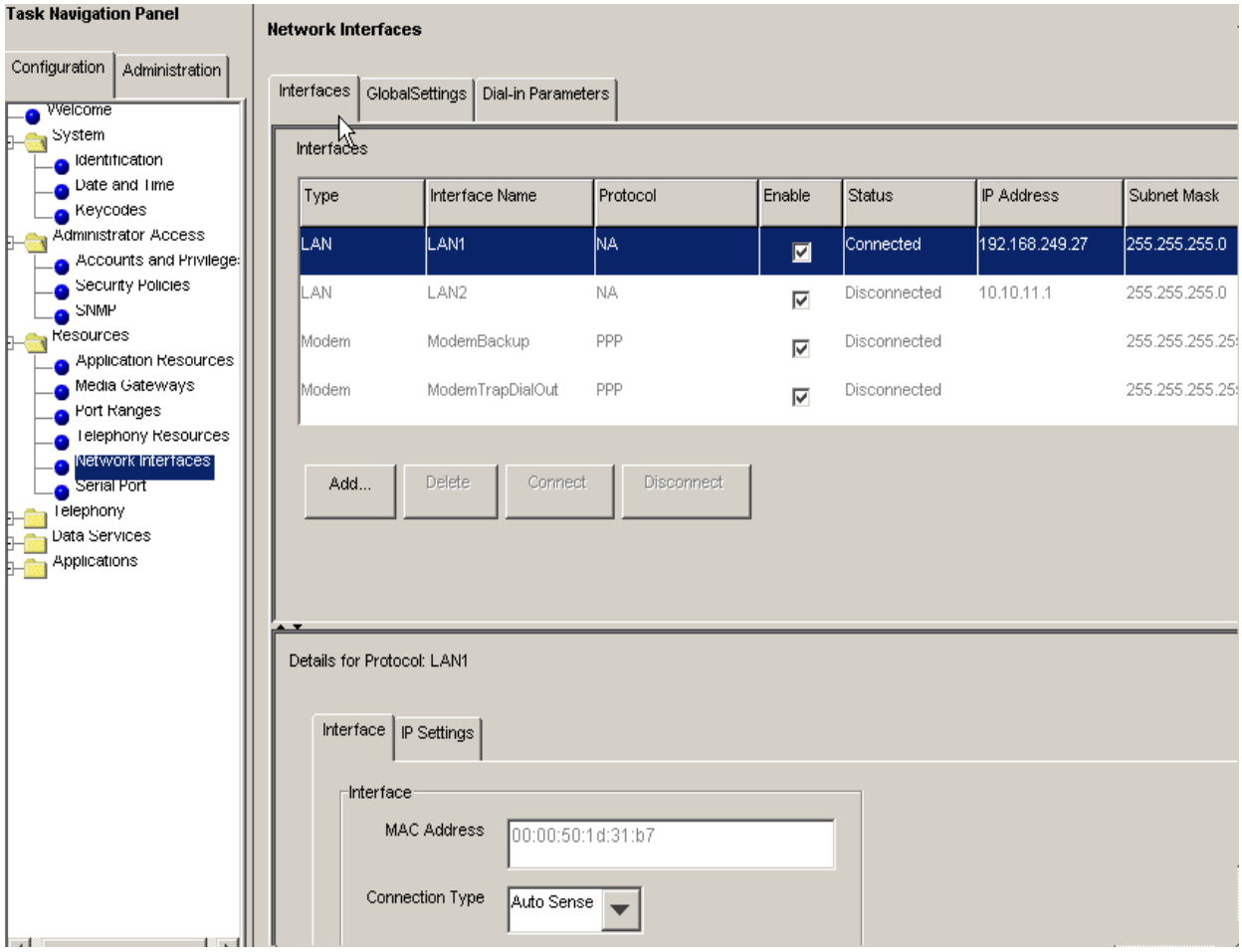
b Open the **Resources** folder.

c Click **Network Interfaces**.

The Network Interfaces panel appears with the Interfaces tab displayed.

d Select the LAN interface you want to use to communicate with the external host (for example, LAN 1).

The Details for Protocol panel appears with the Interface tab displayed.



e Record the information that appears in the **MAC Address** field. This is the MAC address of your BCM.

3 Contact Nortel Support.

a Call 1-800-4Nortel.

b Select option 5.

c Select option 1.

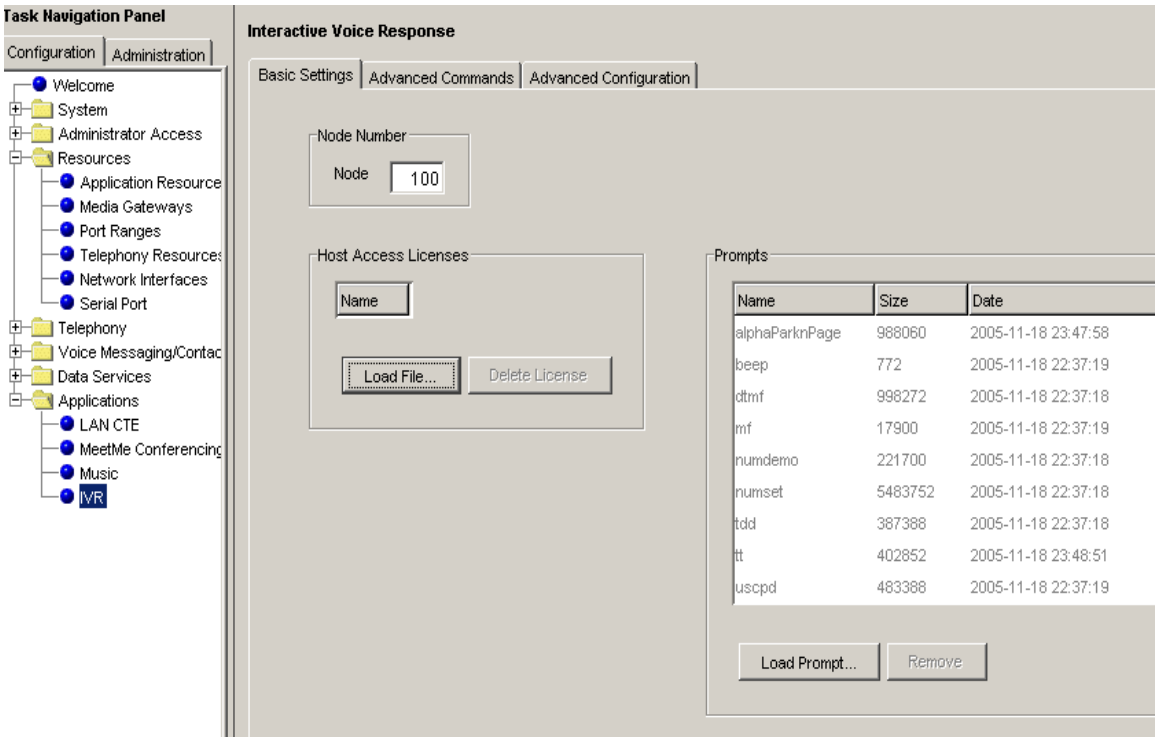
d Tell the Nortel support prime that you need assistance producing a keycode for Business Communications Manager IVR.

You are connected to the level 2 Nortel keycode support prime.

e Tell the support prime that you want to produce a BCM Host Communication keycode (license file).

f Tell the keycode support prime the MAC address you obtained in step 2 and the Authorization number from the NTKC0098 documentation kit.

The Nortel support prime generates the keycode and sends it to you by e-mail. The file is too long to repeat over the telephone. The name of the file is *plservrc*, with no extension.



4 From the **Basics** tab in the **Host Access** area, click **Load File**.

A window opens to allow you to find the keycode that you received.

5 In the **Open** window, use the **Look in**, **File Name**, and **File of Type** fields to navigate to the *plservrc* file.

6 Click **Open**.

A progress bar appears as the keycode loads and IVR restarts.

To configure the Host Communication Access

1 Use TN3270 (TelNet 3270) to activate the host protocol, which is one of the host protocols IVR supports.

TN3270 is a client program that uses the TCP/IP networking protocol. TN3270 is widely used to connect a desktop computer to a mainframe or main server.

a From Element Manager **Task Navigation Panel**, open the **Applications** folder.

b Click **IVR**.

The Interactive Voice Response panel opens with the Basic Settings tab showing.

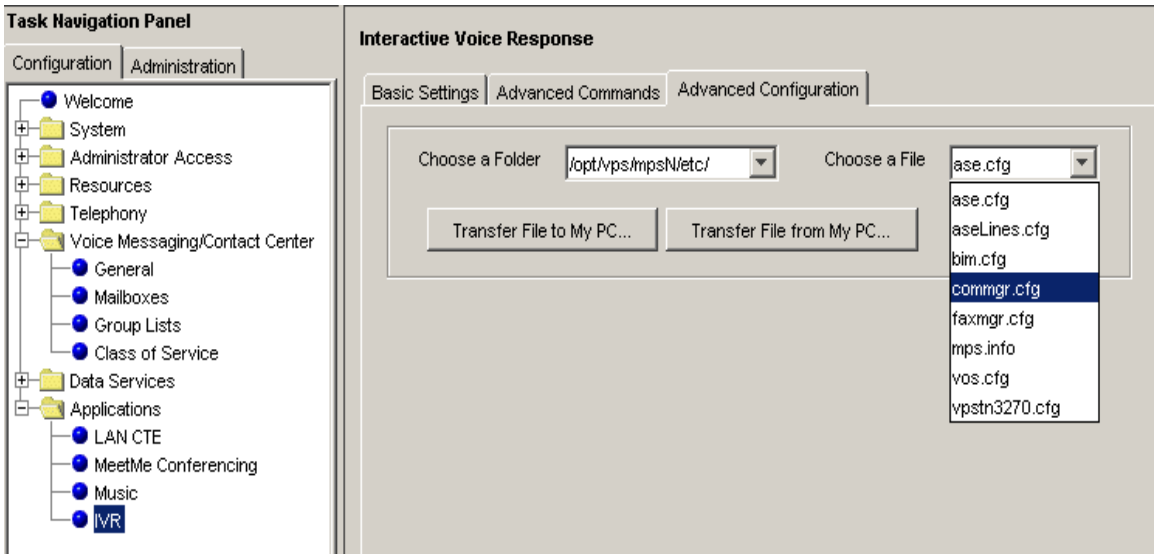
c Click the **Advanced Configuration** tab.

The Advanced Configuration tab appears.

d From the **Choose a Folder** pull-down list, and select the **/opt/vps/mpsN/etc/** folder.

e From the **Choose a File** pull-down list, verify that these files are present:

- commgr.cfg
- vos.cfg
- vpstn3270.cfg

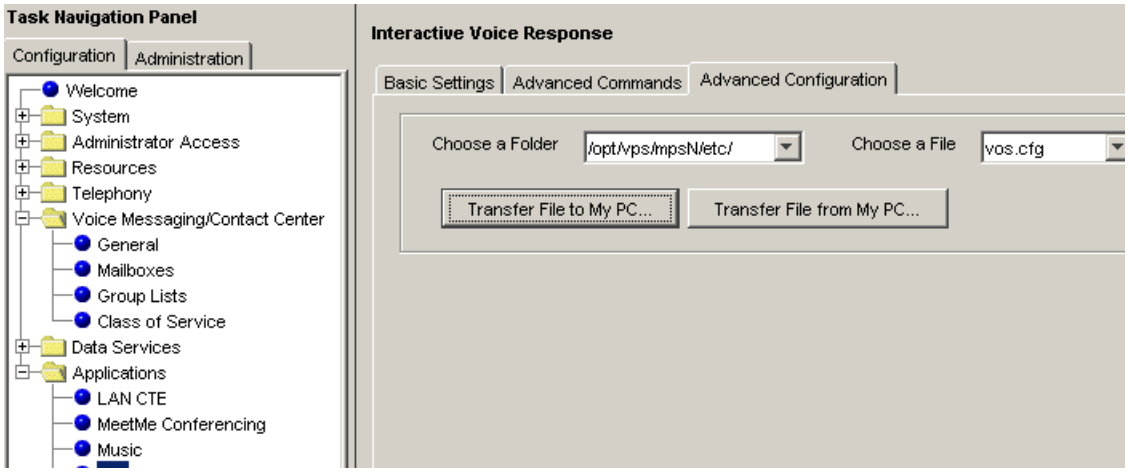


2 Use the **Advanced Configuration** tab to add the entries shown in bold to the **vos.cfg** file:

```
#
# Example vos.cfg file.
#
# NAMEHOSTPORTPRICOMMAND LINE
bim - 0 bim
vstat - - 0 vstat
commgr - - 0 commgr
vpstn3270 - - 0 vpstn3270
```

a In the **Advanced Configuration** tab, select the **/opt/vps/mpsN/etc/** folder from the **Choose a Folder** pull-down list.

b From the **Choose a File** pull-down list, select the **vos.cfg** file.



c Click **Transfer File to My PC**.

The Save window opens.

d In the **Save** window, navigate to where you want to save the **vos.cfg** file on your PC.

e In the **File Name** field type the file name you want to download (vos.cfg).

f Click **Save**.

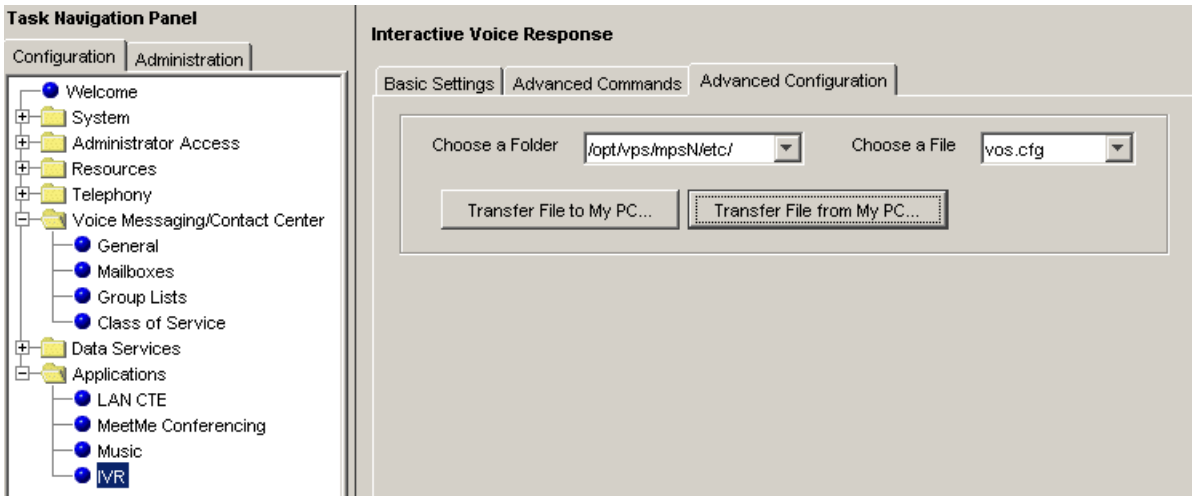
The file saves to the location you specified.

g Locate the file on your PC and open it in Wordpad.

h Edit the file.

i Save your changes and close the file.

From the Element Manager, in the **Advanced Configuration** tab, click **Transfer File From my PC**.



The Save window opens.

j Navigate to the vos.cfg file and click **Load IVR Configuration**.

Note: Ensure that you save your changes in the **/opt/vps/mpsN/etc/** folder.

The edited file uploads to the BCM and appears as vos.cfg in the Choose a File pull-down list.

3 Use the **Advanced Configuration** tab to add the entries shown in bold to the **vpstn3270.cfg** file:

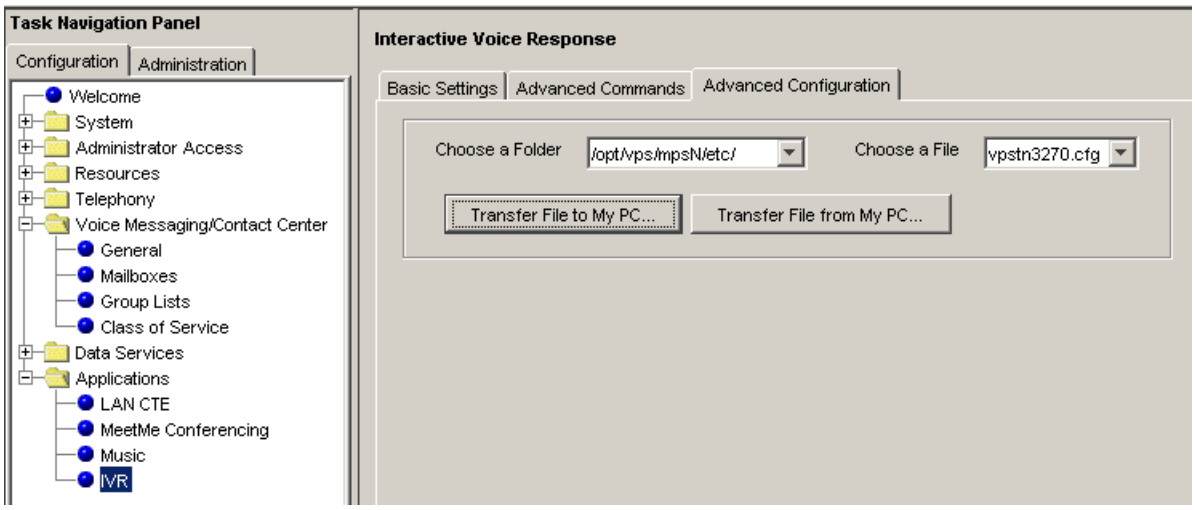
```
#
# vpstn3270 configuration File
#
# Example
#
maxvt 24
hostname falvmx
vt 1-24 ptelnet 1
port 23
init
```

Note: In the vpstn3270.cfg file enter the hostname and use default port 23 to connect to the remote TN3270 host. The parameter maxvt refers to total licensed Interactive Voice Response lines, which are 24 on Business Communications Manager. If you have Interactive Voice Response licenses for four ports, set your maxvt parameter between 1 and 4.

Note: The hostname falvmx is an example of a TN2370.

a In the **Advanced Configuration** tab, select the **/opt/vps/mpsN/etc/** folder from the **Choose a Folder** pull-down list.

b From the **Choose a File** pull-down list, select the **vpstn3270.cfg** file.



c Click **Transfer File to My PC**.

The Save window opens.

d In the **Save** window, navigate to where you want to save the **vpstn3270.cfg** file on your PC.

e In the **File Name** field type the file name you want to download (**vpstn3270.cfg**).

f Click **Save**.

The file saves to the location you specified.

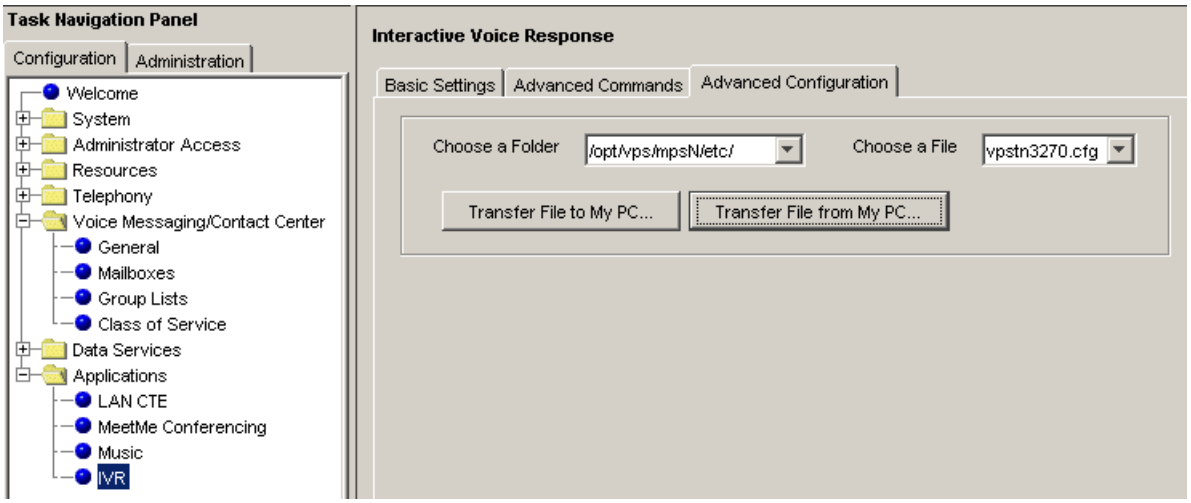
g Locate the file on your PC and open it in Wordpad.

h Edit the **vpstn3270.cfg** file.

i Save your changes and close the file.

j From the Element Manager, in the **Advanced Configuration** tab, click **Transfer File From my PC**.

The Save window opens.



k Navigate to the **vpstn3270.cfg** file and click **Load IVR Configuration**.

Note: Ensure that you save your changes in the **/opt/vps/mpsN/etc/** folder.

The edited file uploads to the BCM and appears as vpstn3270.cfg in the Choose a File pull-down list.

4 Use the **Advanced Configuration** tab to edit the **commgr.cfg** file. In the **commgr.cfg** file, uncomment the host protocol entries for TN3270 as shown here:

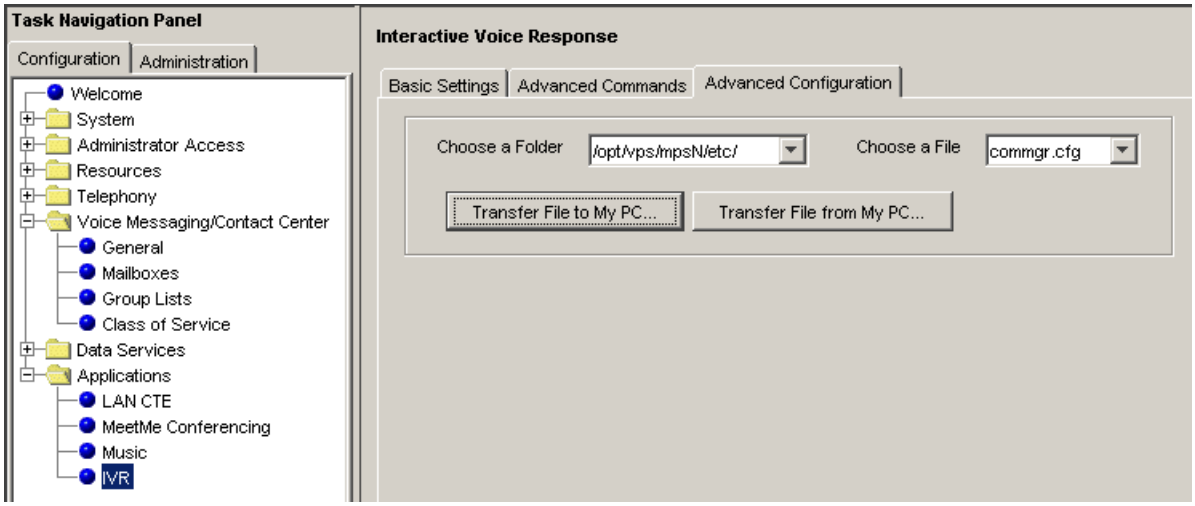
```
#
# VPS TN3270 Example
#
host 1 protocol vpstn3270
host 1 svcid 1-512 unassign
host 1 svcid 1-24 sess 1
host 1 svcid 1-24 assignvt 1
```

a In the **Advanced Configuration** tab, select the **/opt/vps/mpsN/etc/** folder from the **Choose a Folder** pull-down list.

b From the **Choose a File** pull-down list, select the **commgr.cfg** file.

c Click **Transfer File to My PC**.

The Save window opens.



d In the **Save** window, navigate to where you want to save the **commgr.cfg** file on your PC.

e In the **File Name** field type the file name you want to download (**commgr.cfg**).

f Click **Save**.

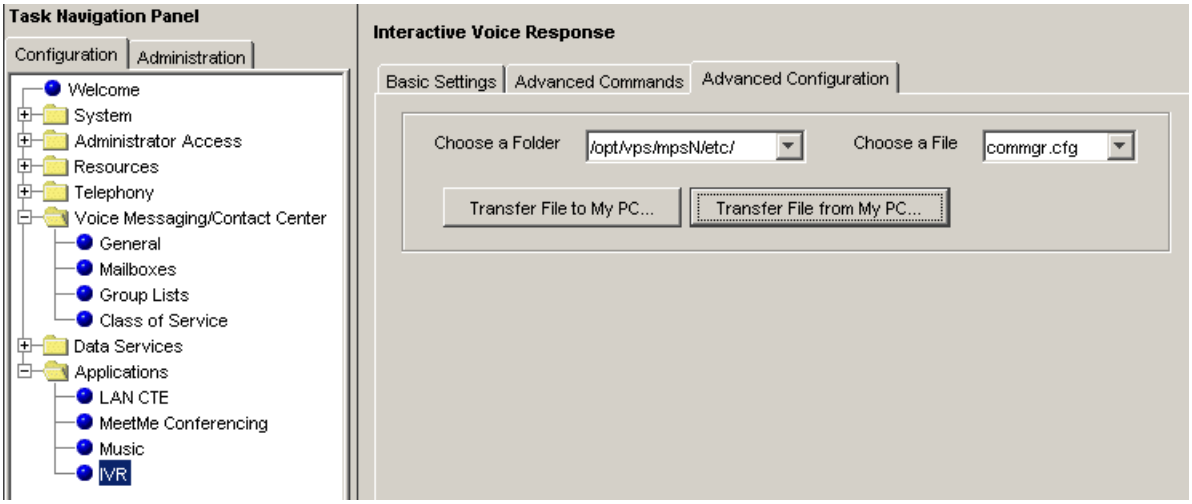
The file saves to the location you specified.

g Locate the file on your PC and open it in Wordpad.

h Uncomment the host protocol entries for TN3270

i Save your changes and close the file.

j From the Element Manager, in the **Advanced Configuration** tab, click **Transfer File From my PC**.



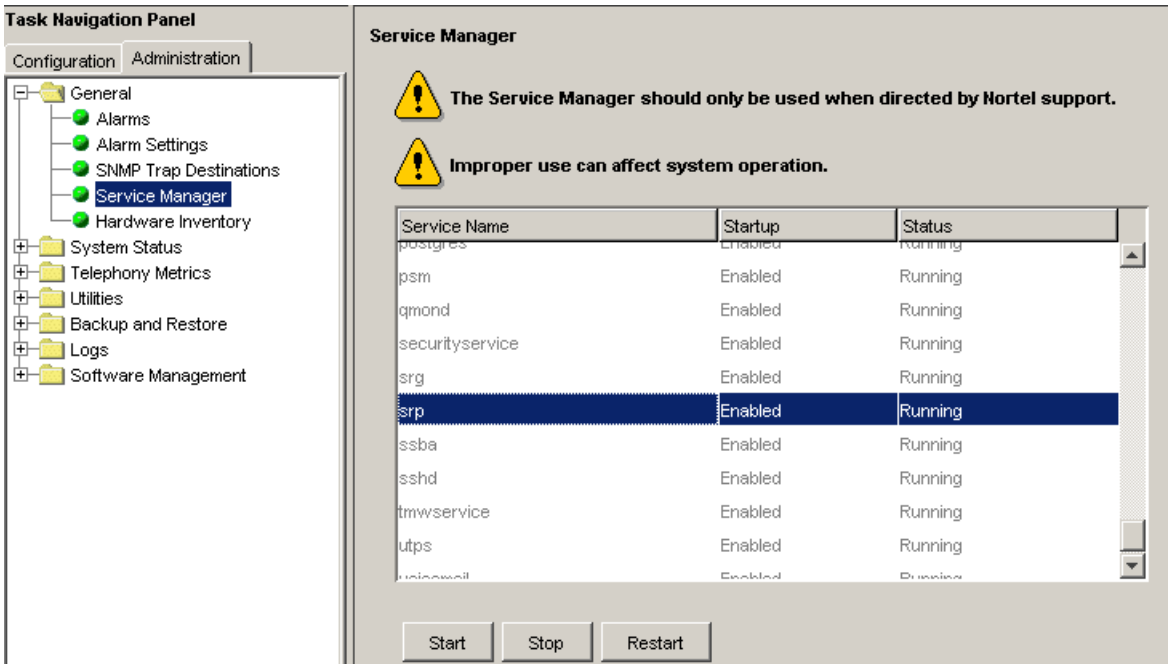
The Save window opens.

k Navigate to the **commgr.cfg** file and click **Load IVR Configuration**.

Note: Ensure that you save your changes in the **/opt/vps/mpsN/etc/** folder.

The edited file uploads to the BCM and appears as commgr.cfg in the Choose a File pull-down list.

5 In Element Manager, use the Service Manager to stop and start the IVR service.



This activates host communications for TN3270 on Business Communications Manager, according to the protocol configuration files you defined.

Complete the procedure "To stop, start, or restart IVR service" on page 57 to verify that the IVR services are running.

If the services are running, return to the IVR application in the Configuration tab.

For each service that is not running, click Restart.

6 Use the IVR **Advanced Commands** to verify that the HOST-specific processes are up and running.

a From Element Manager **Task Navigation Panel**, open the **Applications** folder.

b Click **IVR**.

The Interactive Voice Response panel opens with the Basic Settings tab showing.

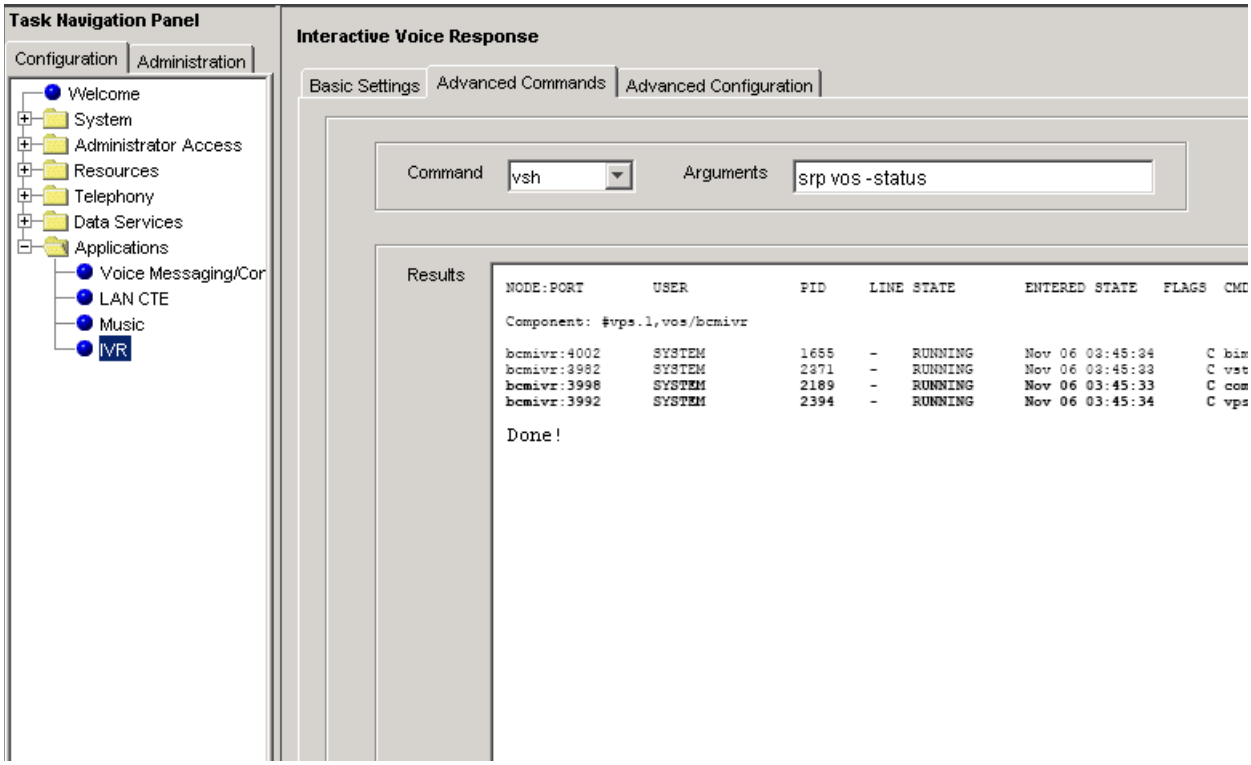
c Click the **Advanced Commands** tab.

The Advanced Commands tab appears.

d From the **Command** pull-down list, select the **vsh** command.In the **Arguments** field, type the arguments you want to add to the **vsh** command (**srp vos -status**).

e Click **Run Command**.

The output appears in the Results panel.



7 Ensure that the host lines have been allocated licenses.

a From Element Manager **Task Navigation Panel**, open the **Applications** folder.

b Click **IVR**.

The Interactive Voice Response panel opens with the Basic Settings tab showing.

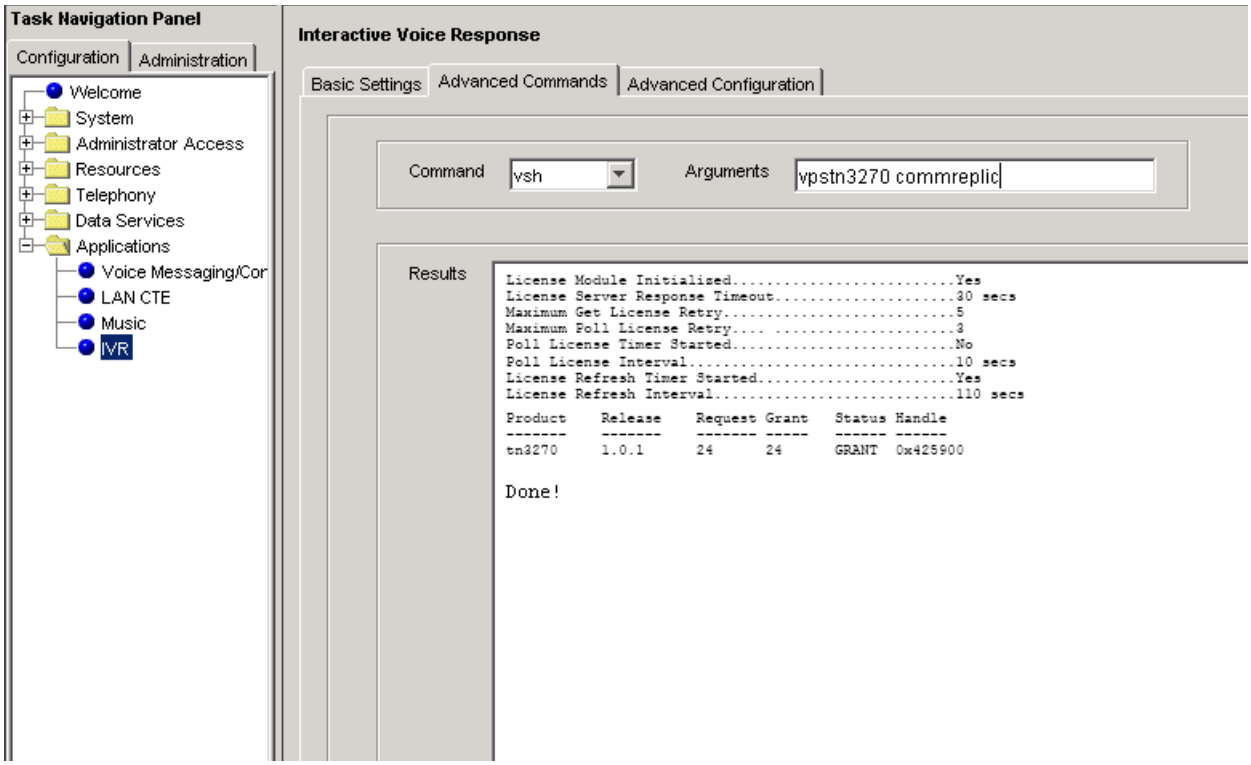
c Click the **Advanced Commands** tab.

The Advanced Commands tab appears.

d From the **Command** pull-down list, select the **vsh** command.In the **Arguments** field, type the arguments you want to add to the **vsh** command (**srp vos -commreplic**).

e Click **Run Command**.

The output appears in the Results panel.



8 From VSH, connect line 1 to Host. Ensure that data can be read from the remote host on the connected line.

a From Element Manager **Task Navigation Panel**, open the **Applications** folder.

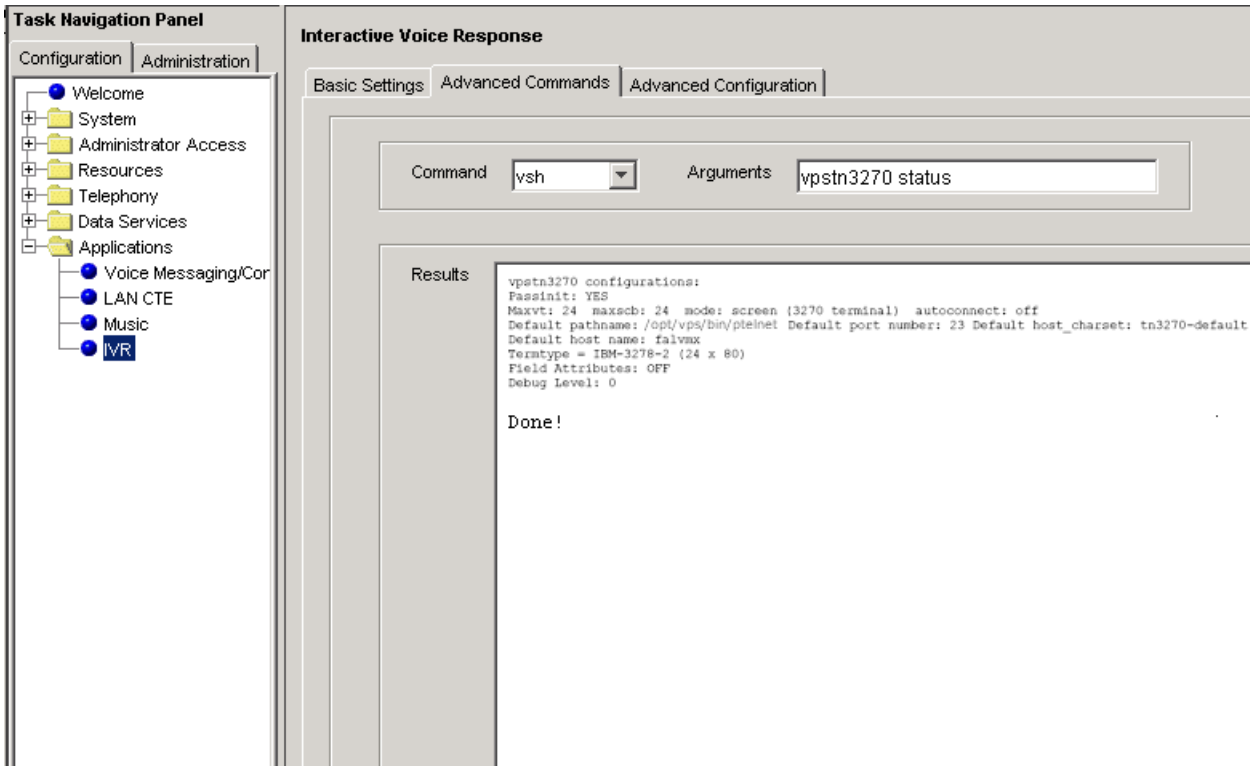
b Click **IVR**.

The Interactive Voice Response panel opens with the Basic Settings tab showing.

c Click the **Advanced Commands** tab.

The Advanced Commands tab appears.

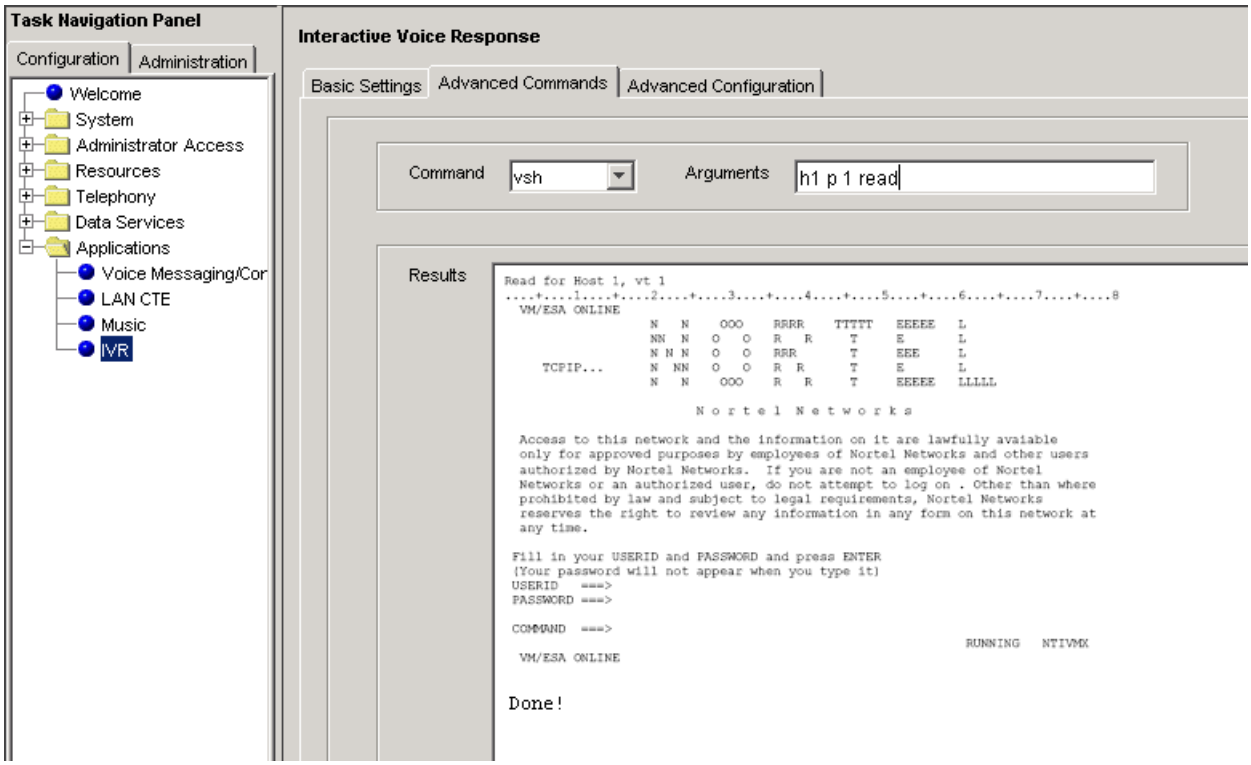
d From the **Command** pull-down list, select the **vsh** command.



e In the **Arguments** field, type the arguments you want to add to the **vsh** command (**srp vos -status**).

f Click **Run Command**.

The output appears in the Results panel.


Task Navigation Panel
Configuration
Administration
Welcome
System
Administrator Access
Resources
Telephony
Data Services
Applications
Voice Messaging/Cor
LAN CTE
Music
IVR
Interactive Voice Response
Basic Settings
Advanced Commands
Advanced Configuration
Command
vsh
Arguments
h1 p 1 read
Results
Read for Host 1, vt 1
VM/ESA ONLINE
TCPIP...
N o r t e l N e t w o r k s
Access to this network and the information on it are lawfully avaiable
only for approved purposes by employees of Nortel Networks and other users
authorized by Nortel Networks. If you are not an employee of Nortel
Networks or an authorized user, do not attempt to log on . Other than where
prohibited by law and subject to legal requirements, Nortel Networks
reserves the right to review any information in any form on this network at
any time.
Fill in your USERID and PASSWORD and press ENTER
(Your password will not appear when you type it)
USERID ===>
PASSWORD ===>
COMMAND ===>
RUNNING NTIVMX
VM/ESA ONLINE
Done!

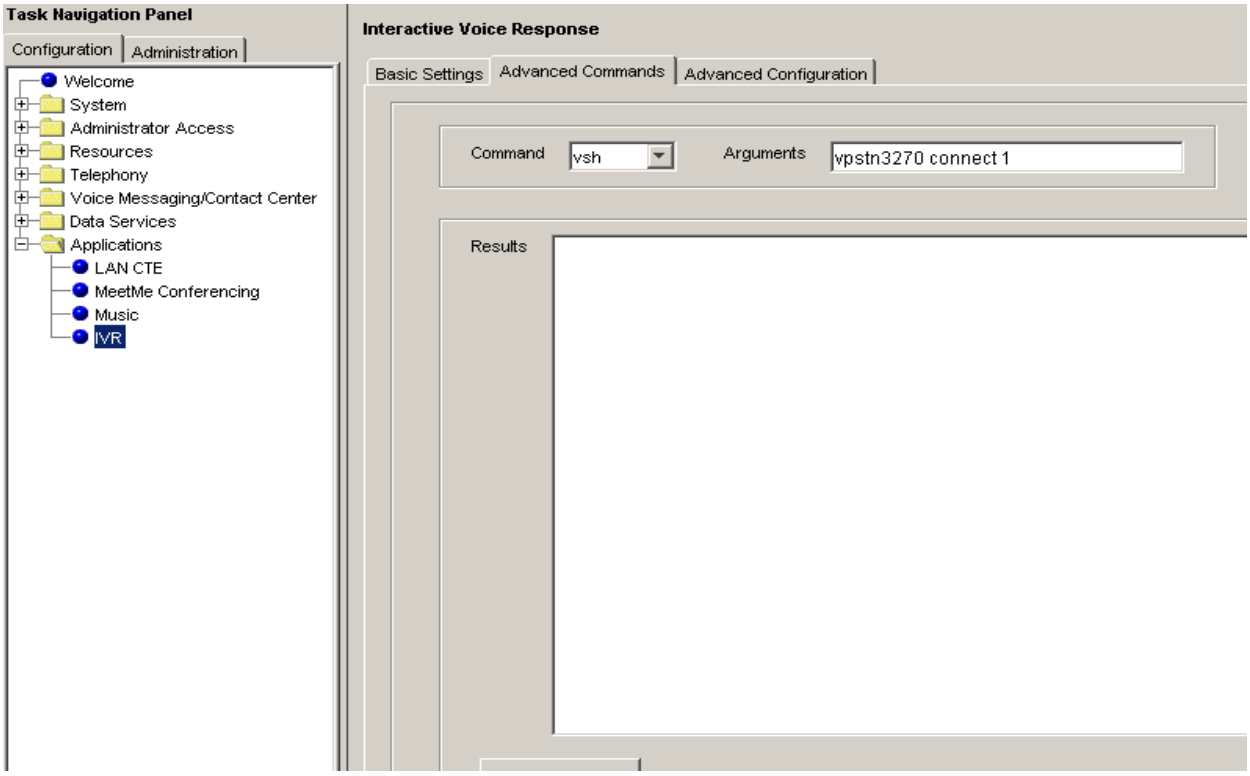
9 Use the IVR **Advanced Commands** to verify that the Host-specific processes are up and running.

a From the **Interactive Voice Response** panel, select the **Advanced Commands** tab.

The Advanced Commands tab appears.

b From the **Command** pull-down list, select the **vsh** command.

c Connect line 1 to the Host and check that data can be read from the remote host on the connected line.



d In the **Arguments** field, type the arguments you want to add to the **vsh** command (shown in bold in the output in substep e, for example, vpstn3270 connect 1 [where 1 is the node number of your BCM]).

e Click **Run Command**.

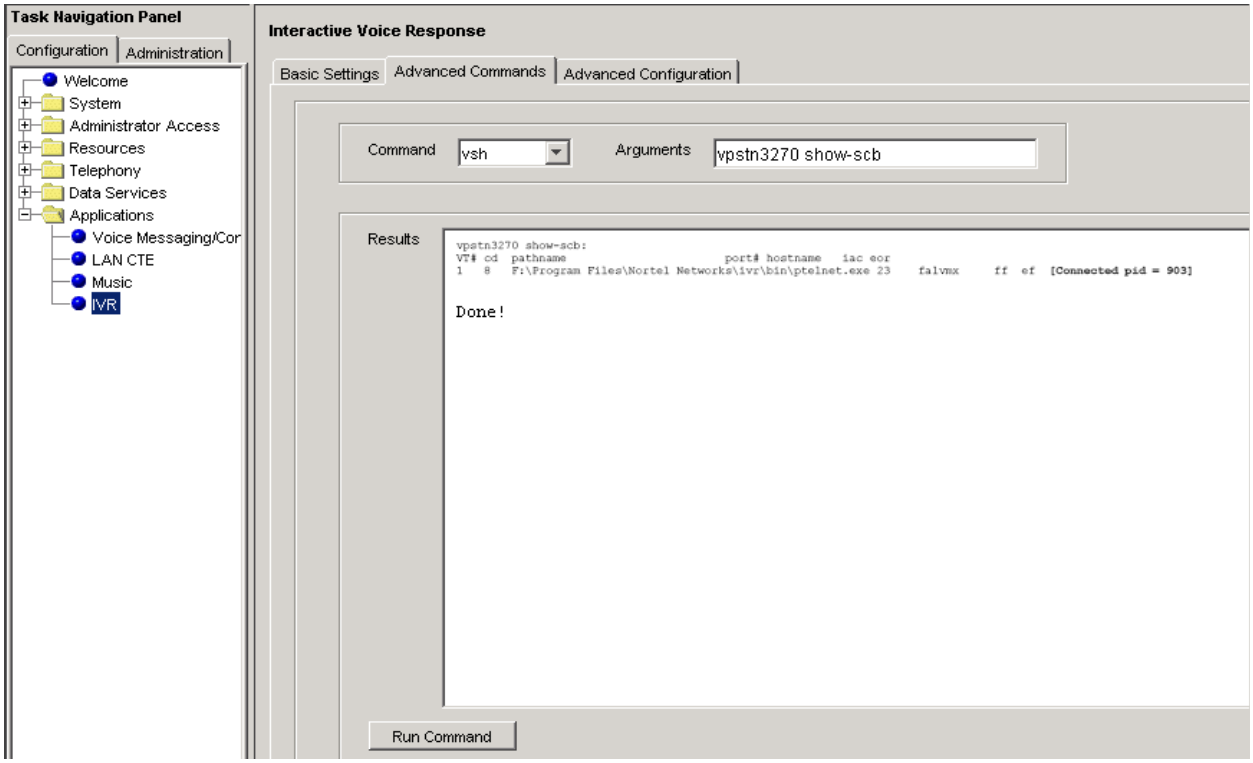
The output appears in the Results panel.

10 From the **Advanced Commands** tab, run the **`vpstn3270 show-scb`** command to check that the Host connection has been made to the physical line:

a Click the **Advanced Commands** tab.

The Advanced Commands tab appears.

b From the **Command** pull-down list, select the **vsh** command.



c In the **Arguments** field, type the arguments you want to add to the **vsh** command (**vpstn3270 show-scb**).

d Click **Run Command**.

The output appears in the Results panel.

Launching an application in PeriView

In Internet Explorer, go to http://<Consolidator_IP>:8080/periview/PeriView.html.

Author's note: Check this address and check to see if it can be made generic, or removed completely.

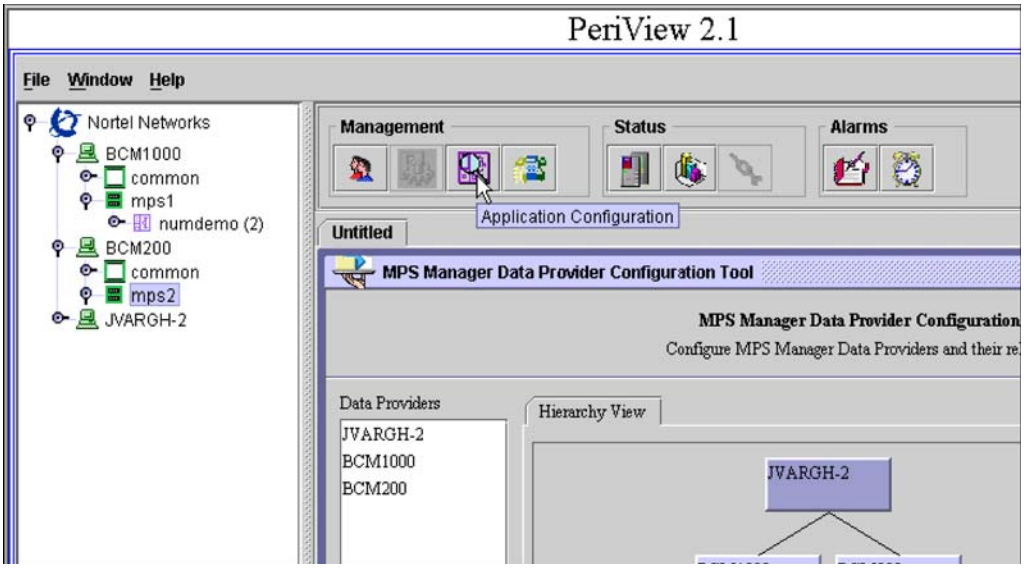
Before you launch an application in PeriView, ensure that all system connections are established and running. All elements of the system, such as BCMs and the Windows host workstation, appear as green icons in the left hand window of the PeriView launch screen.

To launch an application in PeriView

1 Ensure Windows host SRP is up using **Settings > Control Panel > Services > Services Startup**.

2 Launch PeriView.

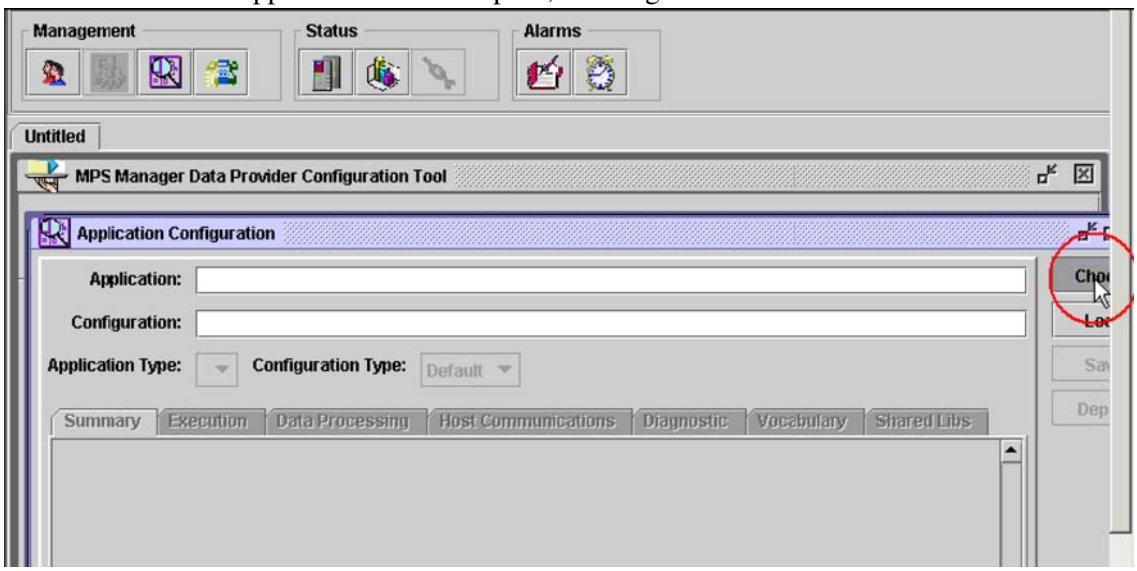
3 In the PeriView launch screen, click **Application Configuration** to start the IVR setup.



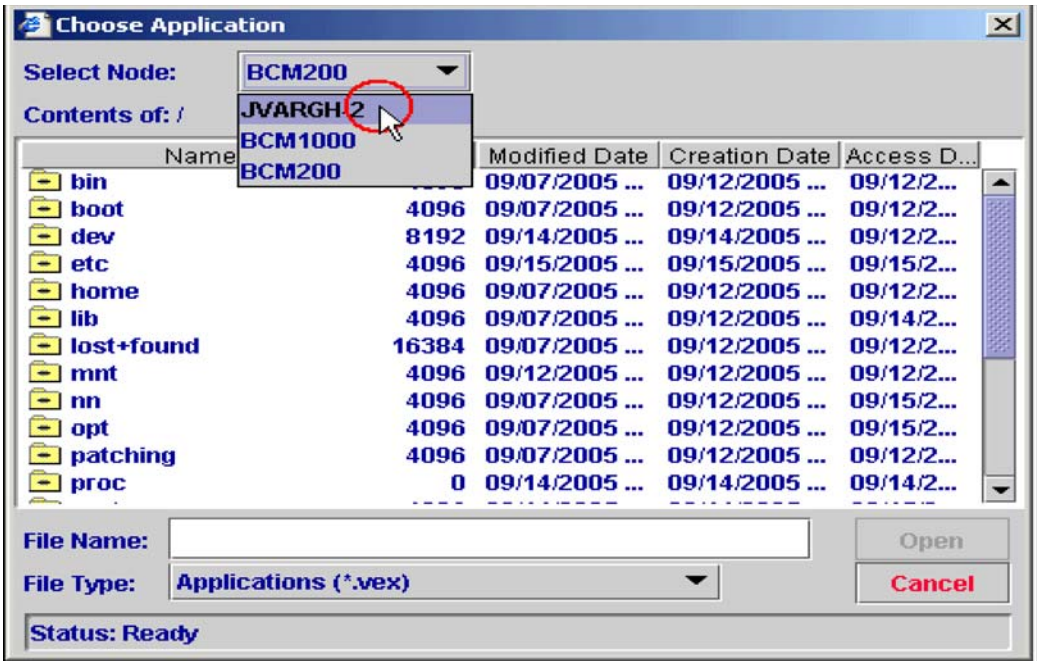
The Windows host workstation is JVARGH. The icon representing the host workstation is green in the left hand window of the PeriView launch screen.

4 Click **Choose**.

The Choose Application window opens, showing folders on the selected node.

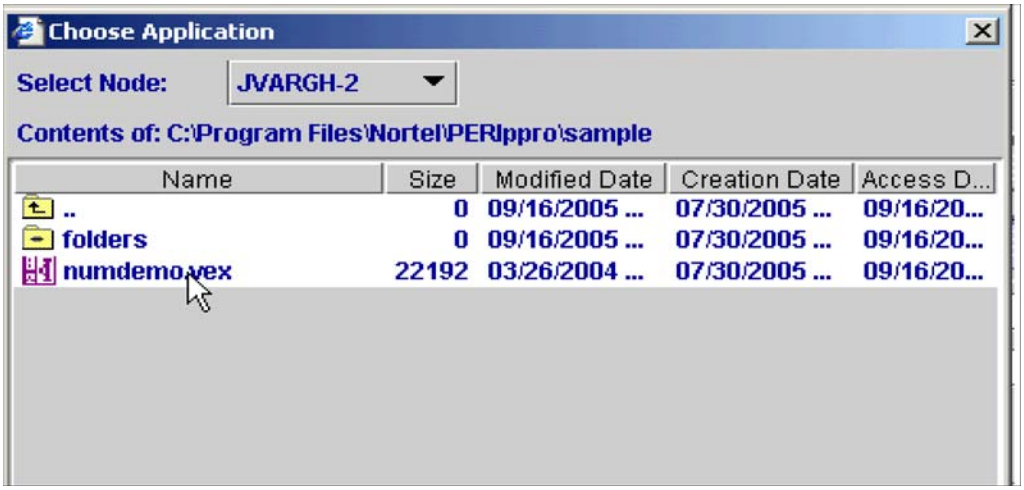


5 From the **Select Node** drop-down list, select the Windows host.



6 Browse the .vex folder.

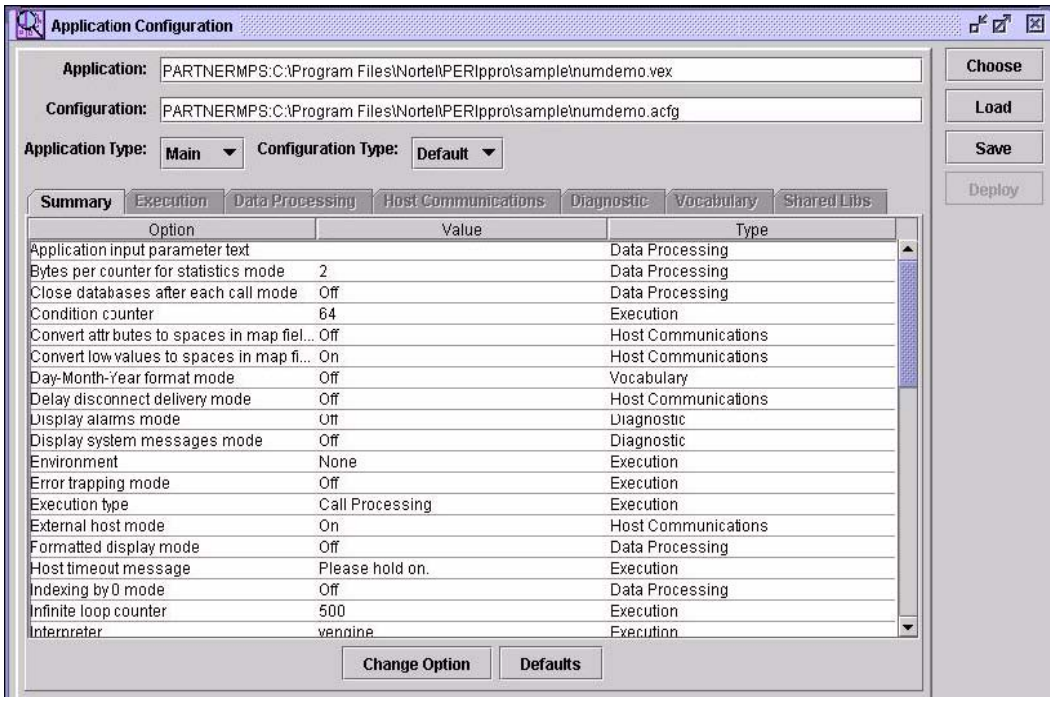
The .vex folder is located in `C:\Program Files\Nortel\PERIppro\sample` and contains only one application (`numdemo.vex`). Files with .vex extensions are the compiled output of PERIproducer source files.



7 Select the .vex file you want to use.

8 Click **Load**.

9 Click **Save**.



Note: PeriView automatically creates the .acfg file when a .vex file is loaded to the Application Configuration utility.

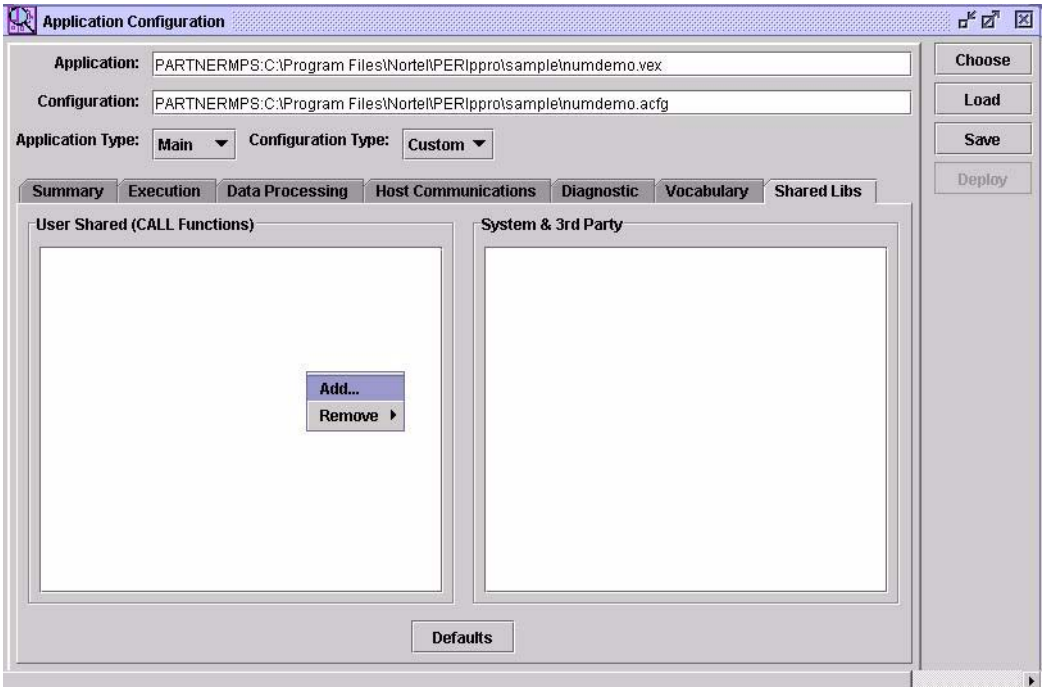
Note: You cannot have two MPS components with the same component number on the same network.

10 To load C/C++ Call Function files (for example, files with .so extensions), click **Change Option**.

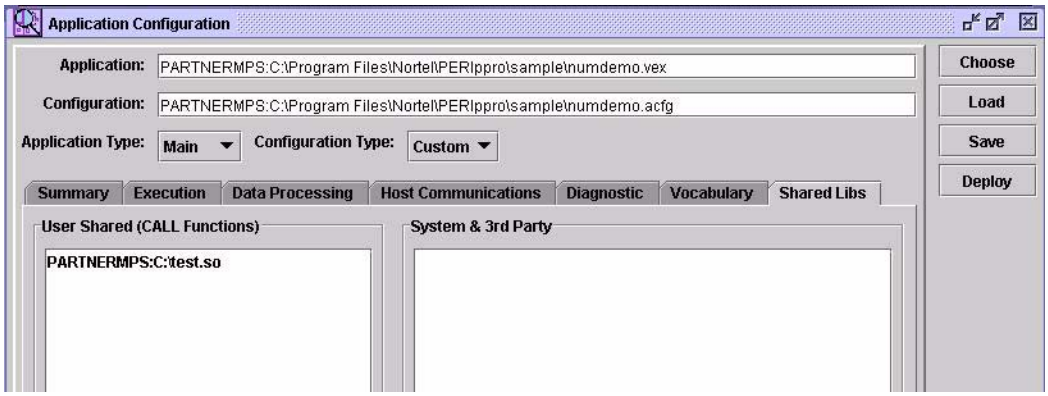
11 Click **Add.**

12 Browse the Windows host folder in which .so files are located and select the .so file you want to use.

The selected .so file is generated on the Fedora NCGL workstation and sent to the Windows host for transfer to the BCM.



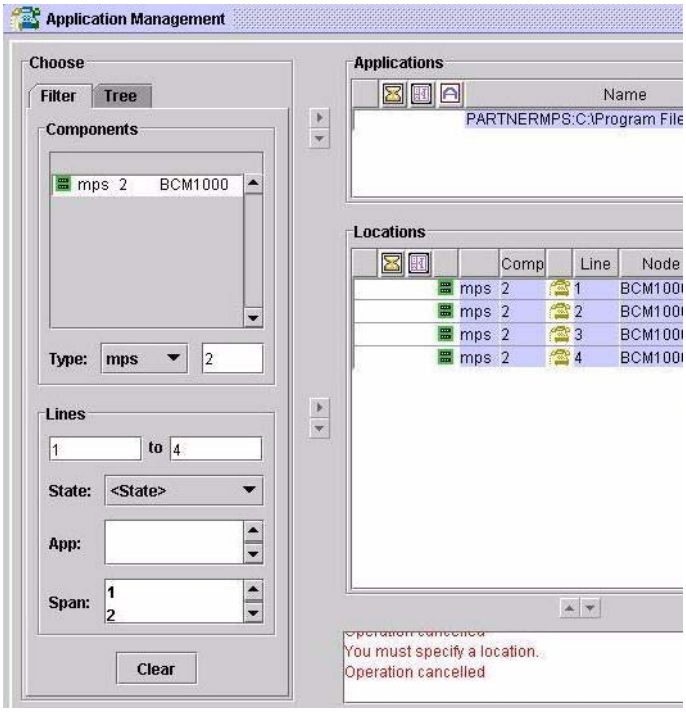
13 Send the .so file to the BCM.



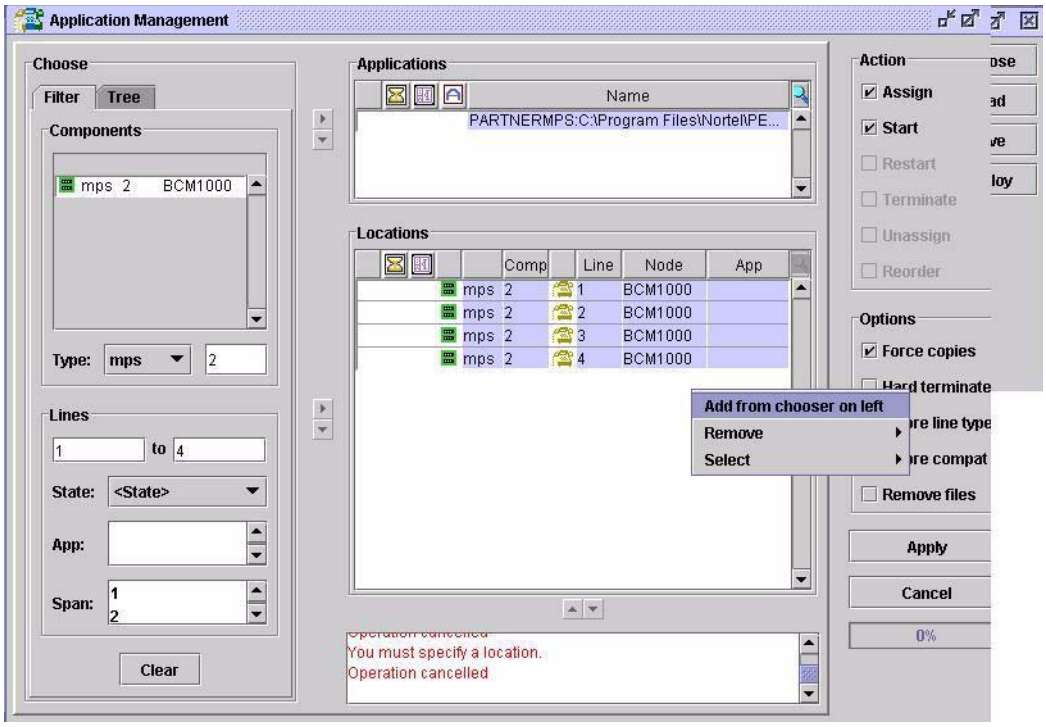
14 Return to the PeriView launch screen and click **Application Management**.

The Application Management window opens.

15 In the **Choose** area of the **Application Management** window, select the MPS nodes and line numbers you want to use.



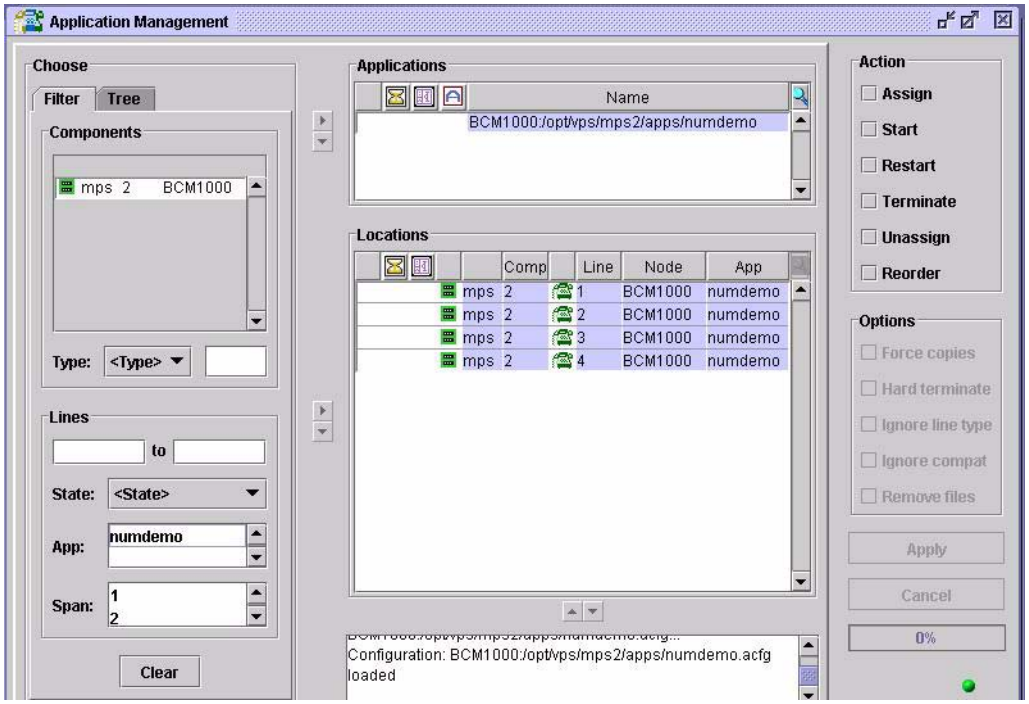
16 Right-click anywhere in the **Application Management** window and select **Add from Chooser on left**.



17 In the right panel of the window, select the **Assign** and **Start** check boxes.

18 Click **Apply** to activate the selected application to the desired BCM ports.

In the following example, the numdemo application has been activated on the BCM/IVR ports 1 through 4. When the applications are up and running, the icons are green.



19 To validate the IVR application, use any phone connected to your BCM system to call the IVR DN.

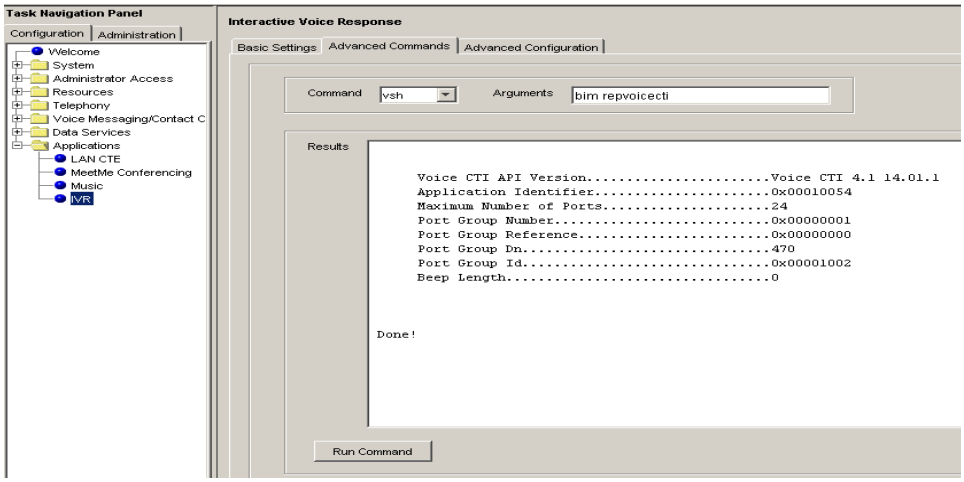
Note: To obtain the IVR DN, use the vsh command (as shown in this example).

a From the **Interactive Voice Response** panel, select the **Advanced Commands** tab.

The Advanced Commands tab appears.

b From the **Command** pull-down list, select the **vsh** command.

c In the **Arguments** field, type the arguments you want to add to the **vsh** command (**bim repvoicecti**).



d Click **Run Command**.

The output appears in the Results panel.

The IVR DN appears in the Port Group DN line of the output.

Dialing the IVR extension

You can use Feature 985 to see what the IVR extension is. Dial this extension to confirm that the appropriate IVR script answers the call.

To dial the IVR extension

1 On a one-line or two-line display telephone connected to your BCM system, press **FEATURE 985**.

The display shows the Voicemail extension.

2 Press the **NEXT** soft key or the pound key (**#**) to view the IVR extension.

The display shows the IVR extension.

3 Dial the IVR extension and check that the script answers the call.

Note: You can program the IVR extension to be any extension on a BCM (for example, the prime is set for trunks, ringing sets for Night Service, or for CFNA sets). For information about changing extensions, see the *BCM 4.0 Administration Guide*.

If you change the IVR extension, you must restart IVR. Complete the procedure "To stop, start, or restart IVR service" on page 57 to restart IVR service .

Assigning lines to IVR

You can assign which lines answer IVR calls. To assign multiple lines, go to "To assign multiple lines to IVR" on page 53.

To assign lines to IVR

1 Launch and log on to the Element Manager.

The Element Manager opens with the Task Navigation Panel open.

2 From the **Configuration** tab, open the **Application** folder.

3 Click **Voice Messaging/Contact Center**.

The Voice Messaging/Contact Center panel appears.

4 Click **Launch CallPilot Manager**.

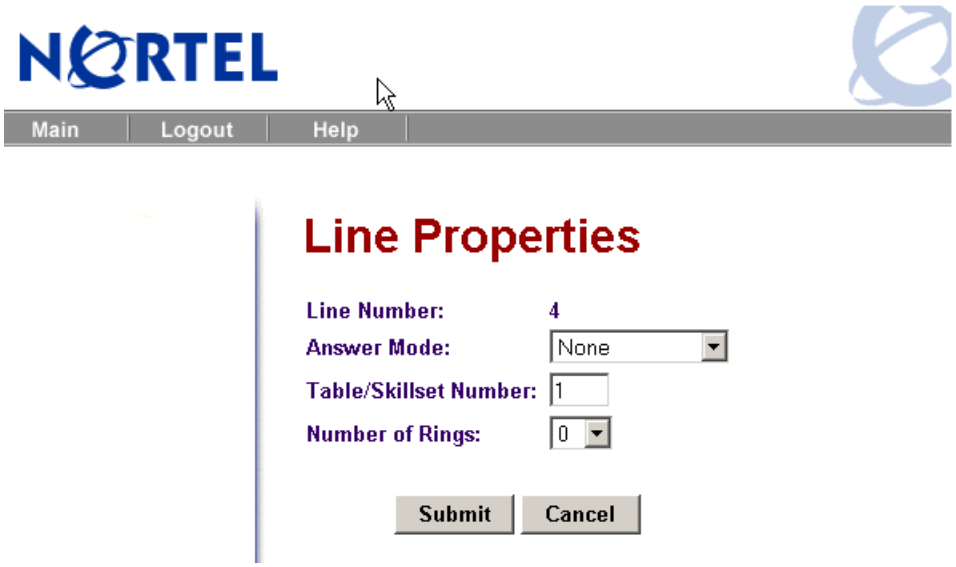
The CallPilot Manager Main Menu opens in your web browser.

5 Click **Auto Attendant**.

The Lines Administration page appears.

6 Click the **Change** link for the line you want to assign to IVR.

The Line Properties page opens.



7 From the **Answer Mode** list box, select **IVR**.

8 From the **Number of rings** list box select the number of rings you want there to be before IVR answers.

You must select a number from 0 to 12. If you set the number to less than 2, Caller ID information cannot be passed to IVR for analog lines.

9 Click **Submit**.

To assign multiple lines to IVR

1 Launch and log on to the Element Manager.

The Element Manager opens with the Task Navigation Panel open.

2 From the **Configuration** tab, open the **Applications** folder.

3 Click **Voice Messaging/Contact Cente**r.

The Voice Messaging/Contact Center panel appears.

4 Click **Launch CallPilot Manager**.

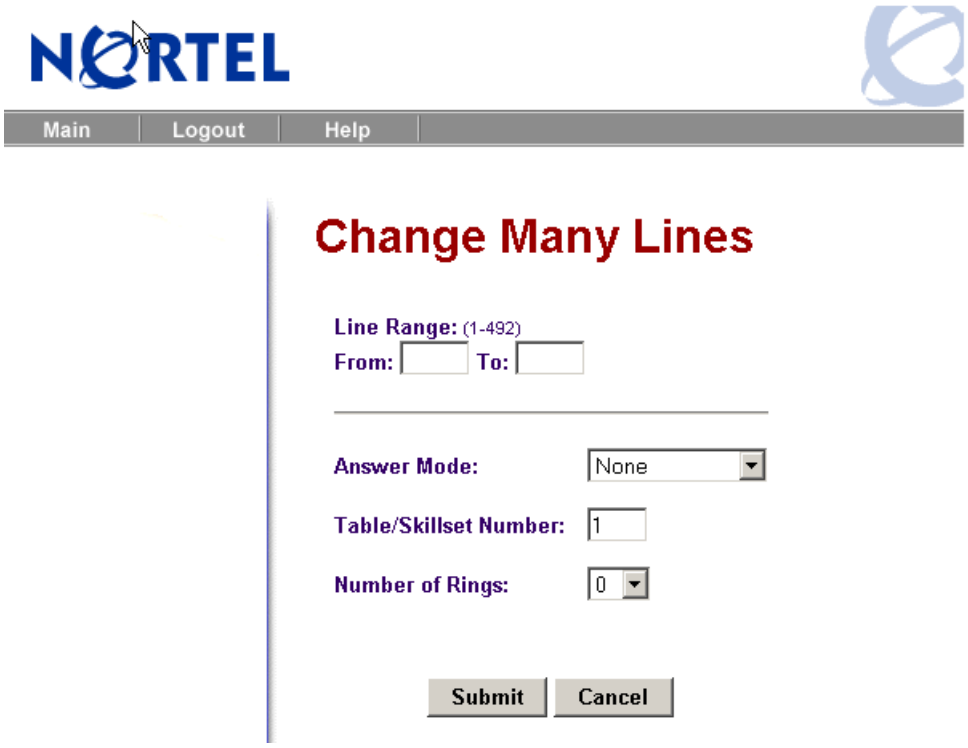
The CallPilot Manager Main Menu opens in your web browser.

5 Click **Auto Attendant**.

The Lines Administration page appears.

6 Click **Change Many Lines**.

The Change Many Lines page appears.



7 In the **From** field, type the number of the first line to add.

8 In the **To** field, type the number of the last line to add.

9 From the **Answer Mode** list box, select **IVR**.

10 From the **Number of rings** pull-down list, select the number of rings before IVR answers.

You must select a number from 0 to 12. If you set the number to less than 2, Caller ID information cannot be passed to IVR.

11 Click **Submit**.

Viewing or changing the system fax name

When IVR sends a fax, it uses the system fax name that is programmed in CallPilot Manager. The system name transmits to external fax machines as the station ID of the site. Many fax machines show this value when transmitting or receiving, and record it in transmission logs. If you have not entered a system name, no station ID is sent.

The system name can be a maximum of 16 characters. You can use your main fax number as the system name.

To view or change the system fax name

1 Launch and log on to the Element Manager.

The Element Manager opens with the Task Navigation Panel open.

2 From the **Configuration** tab, open the **Application** folder.

3 Click **Voice Messaging/Contact Cente**r.

The Voice Messaging/Contact Center panel appears.

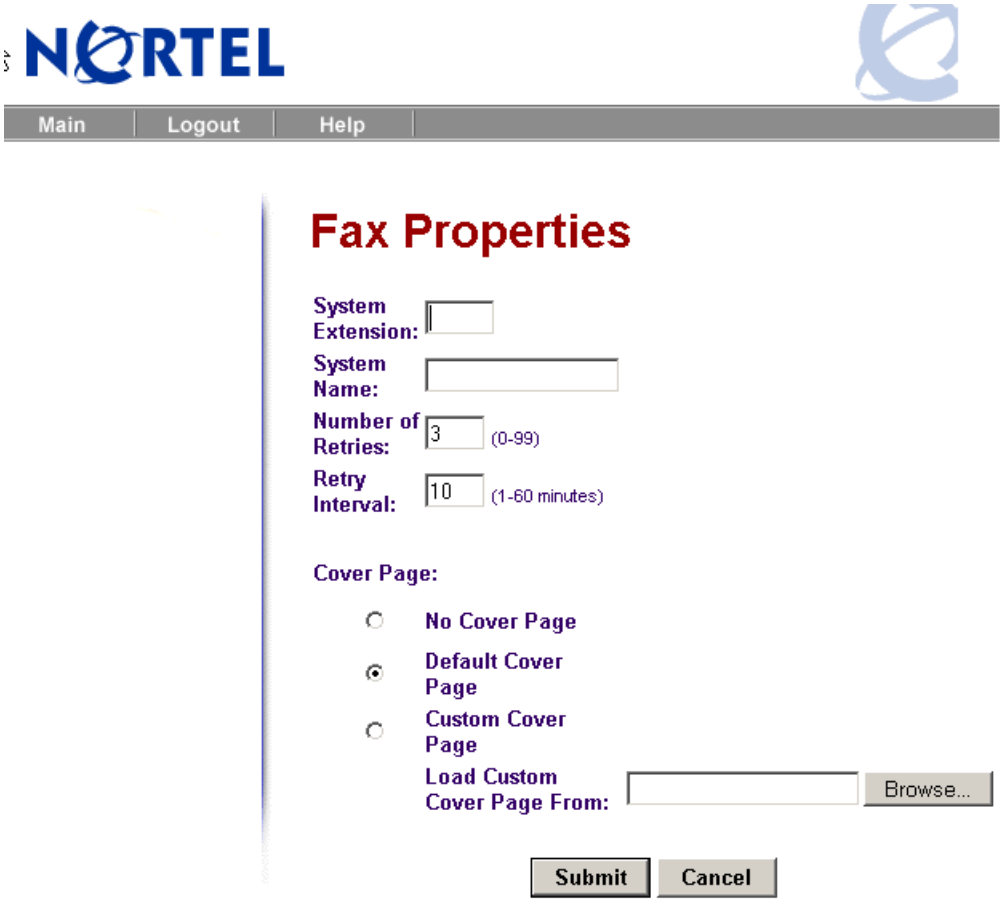
4 Click **Launch CallPilot Manager**.

The CallPilot Manager Main Menu opens in your web browser.

5 Click **Configuration**.

6 Click **Fax Properties**.

The Fax Properties web page opens.



Note: This page can appear different, depending on your system information.

7 To change the system fax name, in the **System Name** field enter a name for your IVR system. The name can be a maximum of 16 characters.

Chapter 3
Administering Interactive Voice Response

This chapter contains the following information about how to administer the IVR application on your BCM system:

- Stopping, starting, or restarting IVR service
- Uninstalling PERI packages for BCM/IVR 1.x automatically
- IVR logs
- IVR guides

Stopping, starting, or restarting IVR service

There are three IVR services:

- plicd: the IVR license server

  The plicd service stops and starts automatically when a backup and restore activity occurs or when a new license is downloaded. The plicd service does not run when there is no license present.

- mmdp: the IVR PeriView server

  The mmdp service stops and restarts automatically when a backup and restore activity occurs, when IVR prompts are added or removed, or when a node number is changed.

- srp: the IVR Runtime engine

  The srp service stops and restarts automatically when a backup and restore activity occurs, when IVR prompts are added or removed, or when a node number is changed.

To stop, start, or restart IVR service

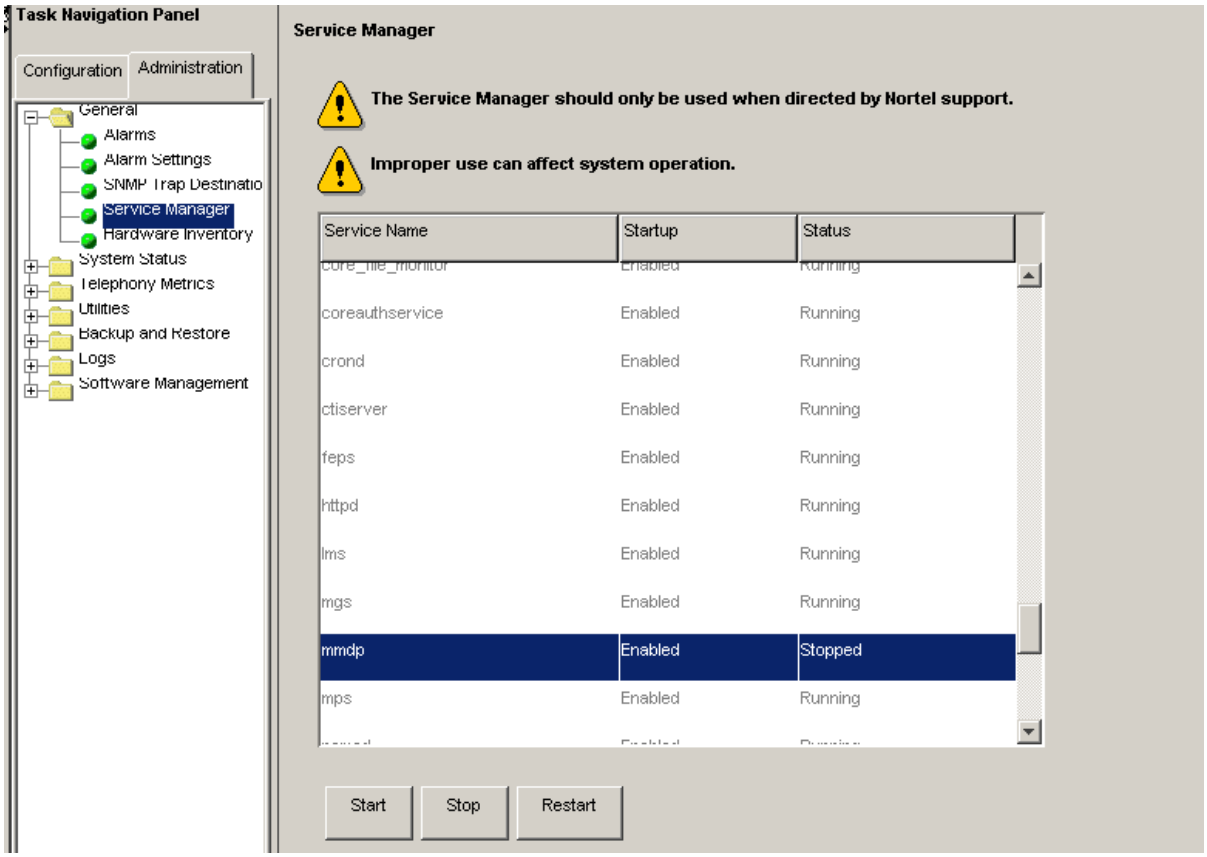
1 Launch and log on to Element Manager.

  The Element Manager opens, showing the Task Navigation Panel.

2 From the **Administration** tab, open the **General** folder.

3 Click **Service Manager**.

The Service Manager panel appears.



4 Select one of the following IVR files from the **Service Name** column:

- plicd (only available if a Host Access license was purchased)
- mmdp
- srp

The Start, Stop, and Restart buttons become available.

5 Click the appropriate button to start, stop, or restart the selected service.

Uninstalling PERI packages for BCM/IVR 1.x automatically

If BCM/IVR 1.x is already on the Windows workstation, complete the following procedure to remove the BCM/IVR 1.x PERI packages before you install BCM/IVR 2.1.

To uninstall PERI packages with the MPS 2.1 Software and Document CD

1 Ensure PERI packages are installed on the box by either:

a running the following command:

```
C:\perl -S perirev.plx outfile=STDOUT
```

This command produces an output similar to the following example:

```
PERIase       4.7.1
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20020122
PERIfw        1
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20011214
PERIgase      1.0.0
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20020104
PERIglobl     1.1.1
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20010611
PERIgrs       2.2
                          PkgCutDate-20030729
PERIperl      1.0.1
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20020116
PERIplic       1.1.1
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20021004
PERIppro      2.30
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20010427
PERIpstu      2.20
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20010427
PERIrdb       1.2
                          PERIMPSPatch Bundle 7
                          PERIrel5Patch Bundle 27 BundleCutDate-20031007
                          PkgCutDate-20020117
PERIview      1.0.0
                          PERIMPSPatch Bundle 7
                          PkgCutDate-20020516
```

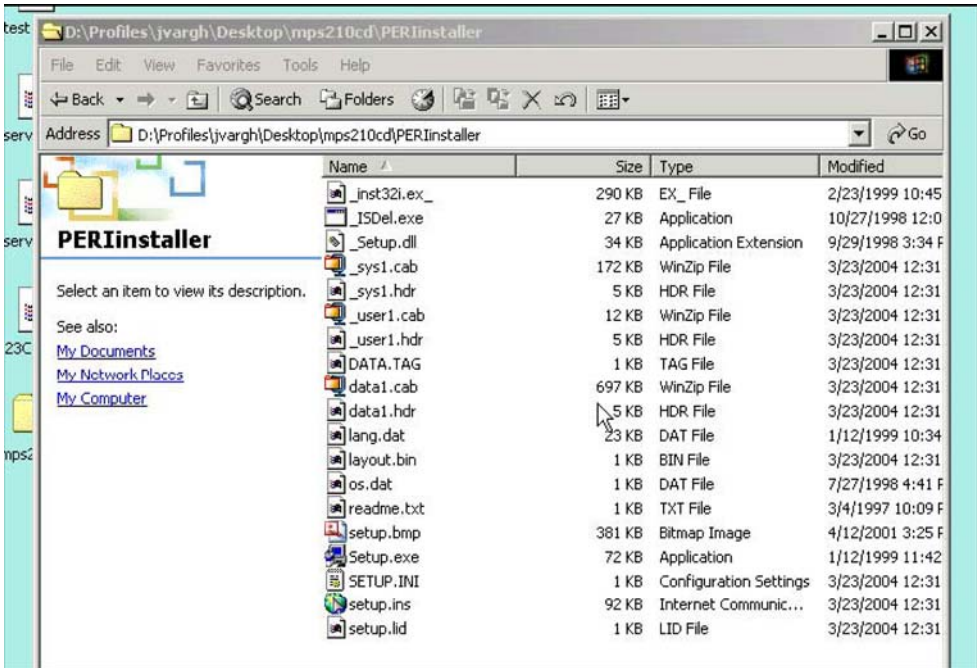
b going to **Start > Settings > Control Panel >Add or Remove Programs**

The Currently installed programs list contains the list of all PERI packages to be uninstalled.

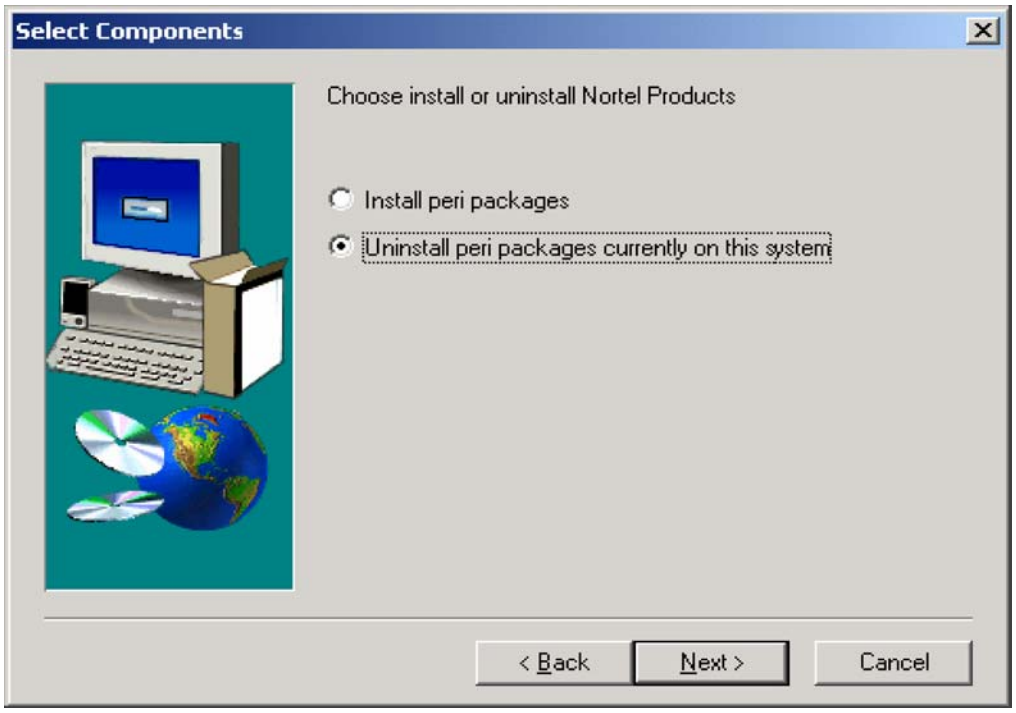
2 If you are upgrading your operating system from Windows NT to Windows 2000, back up old license files to an external media other than the Windows Workstation.

Warning: Back-up old license files by copying C:\Program Files\Nortel\PERIplic\etc\plservc to a safe location.

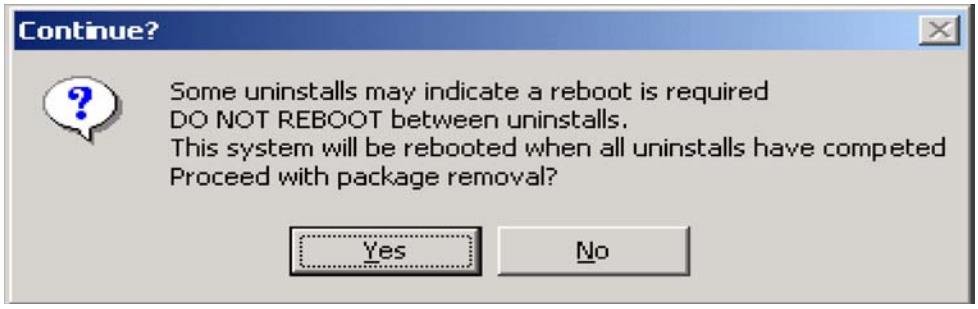
3 Insert the MPS 2.1 Software, Documentation and Update CD and run `PERIinstaller\setup.exe`.


D:\Profiles\jvargh\Desktop\mps210cd\PERIinstaller
File Edit View Favorites Tools Help
Back Search Folders
Address D:\Profiles\jvargh\Desktop\mps210cd\PERIinstaller
Go
PERIinstaller
Select an item to view its description.
See also:
My Documents
My Network Places
My Computer
Name Size Type Modified
inst32i.ex 290 KB EX_ File 2/23/1999 10:45
_ISDel.exe 27 KB Application 10/27/1998 12:0
_Setup.dll 34 KB Application Extension 9/29/1998 3:34 F
_sys1.cab 172 KB WinZip File 3/23/2004 12:31
_sys1.hdr 5 KB HDR File 3/23/2004 12:31
_user1.cab 12 KB WinZip File 3/23/2004 12:31
_user1.hdr 5 KB HDR File 3/23/2004 12:31
DATA.TAG 1 KB TAG File 3/23/2004 12:31
data1.cab 697 KB WinZip File 3/23/2004 12:31
data1.hdr 5 KB HDR File 3/23/2004 12:31
lang.dat 23 KB DAT File 1/12/1999 10:34
layout.bin 1 KB BIN File 3/23/2004 12:31
os.dat 1 KB DAT File 7/27/1998 4:41 F
readme.txt 1 KB TXT File 3/4/1997 10:09 F
setup.bmp 381 KB Bitmap Image 4/12/2001 3:25 F
Setup.exe 72 KB Application 1/12/1999 11:42
SETUP.INI 1 KB Configuration Settings 3/23/2004 12:31
setup.ins 92 KB Internet Communic... 3/23/2004 12:31
setup.lid 1 KB LID File 3/23/2004 12:31

4 Select Uninstall when the Select Components window opens.



The following message appears:


Continue?
Some uninstalls may indicate a reboot is required
DO NOT REBOOT between uninstalls.
This system will be rebooted when all uninstalls have competed
Proceed with package removal?
Yes
No

5 Click **Yes**.

6 After the system has rebooted, select Start > Settings > Control Panel >Add or Remove Programs and confirm that all PERI packages have been removed.

Using IVR Basic Settings

You can manage IVR integration using the Element Manager. From the Applications folder in the Task Navigation Panel, you can navigate to the Interactive Voice Response panel. The Interactive Voice Response panel has three tabs:

- Basic Settings
- Advanced Commands
- Advanced Configuration

Use the Basic Settings tab to:

- change a node number (see “To change the node number” on page 13)
- load an IVR keycode file onto the BCM (see “To enable the Host Communication Access keycode” on page 28 and “To configure the Host Communication Access” on page 30)
- load or remove prompts (see “To upload IVR prompts” on page 26)

Using IVR Advanced Commands

Use the Advanced Commands tab on the Interactive Voice Response panel in Element Manager to execute advanced IVR commands.

Outputs from commands appear in the Results area of the Advanced Commands panel.

To execute an advanced IVR command

1. Launch and log on to Element Manager.

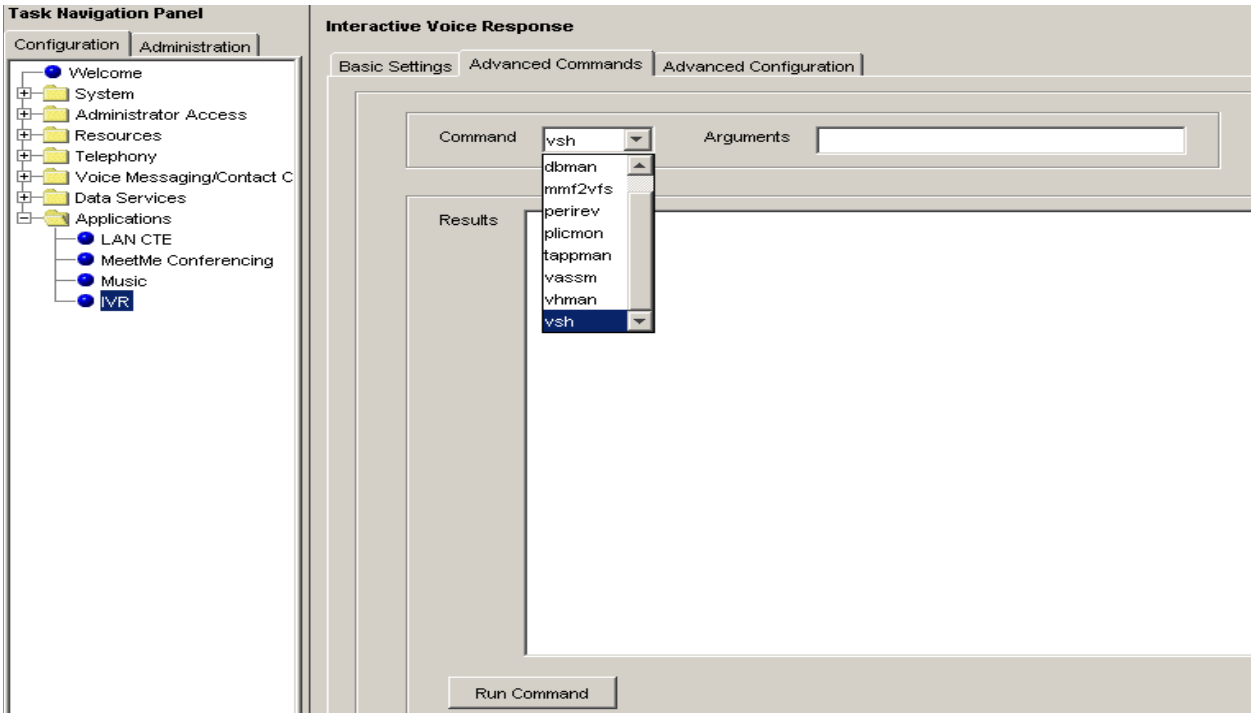
   The Element Manager opens, showing the Task Navigation Panel.

2. From the **Configuration** tab, open the **Applications** folder.

3. Click **IVR**.

   The Interactive Voice Response panel appears with the Basic Settings tab showing.

4. Select the **Advanced Commands** tab.



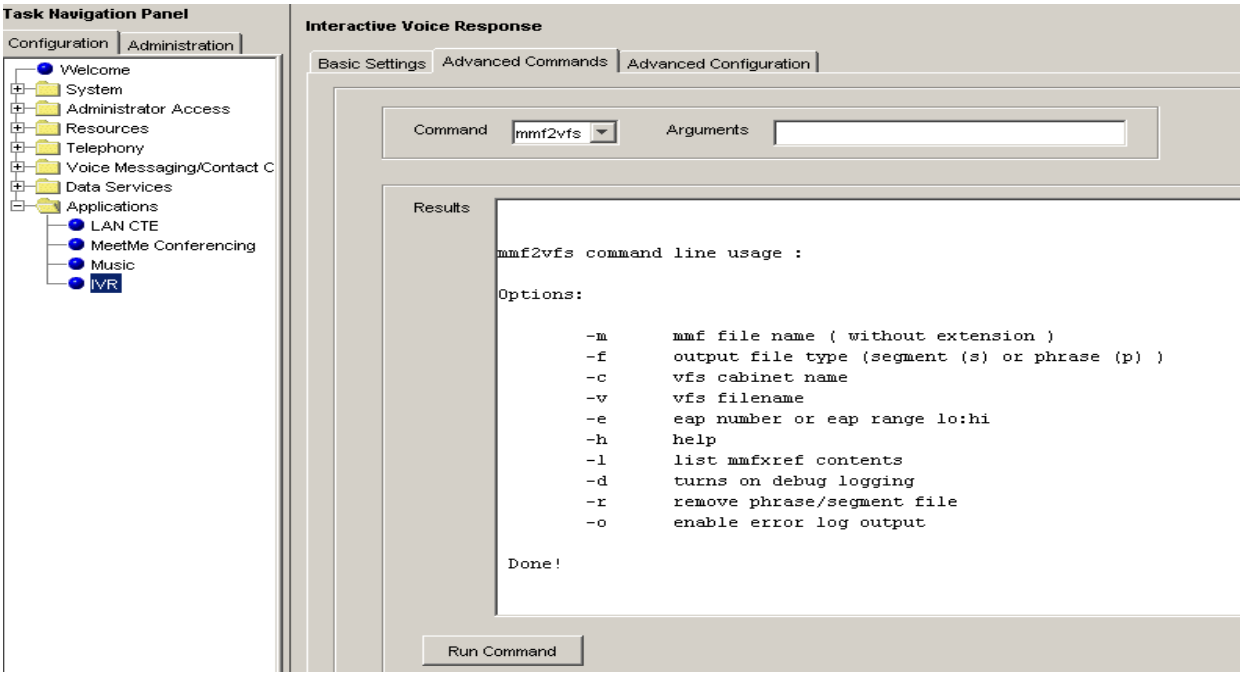
5. From the **Commands** pull-down list, select the command you want to execute.

6 In the **Arguments** field, enter any arguments required by the command you selected.

Note: If you leave the Arguments field blank and click Run Command, a list of arguments appears in the Results area (for those commands that require arguments).

7 Click **Run Command**.

The output appears in the Results area.



Note: The “Done” string always appears at the end of the Results area.

Using IVR Advanced Configuration

Use the Advanced Configuration tab on the Interactive Voice Response panel in Element Manager to carry advanced IVR configuration actions. From the Advanced Configuration tab you can transfer, from your BCM, files that require configuring, edit the files on a PC, then transfer the files back to the BCM. The files that you can transfer and edit in this manner can be found only in specific IVR folders.

If you must upload new configuration files to the BCM, you can transfer them to these folders only.

To use advanced IVR configuration

1 Launch and log on to Element Manager.

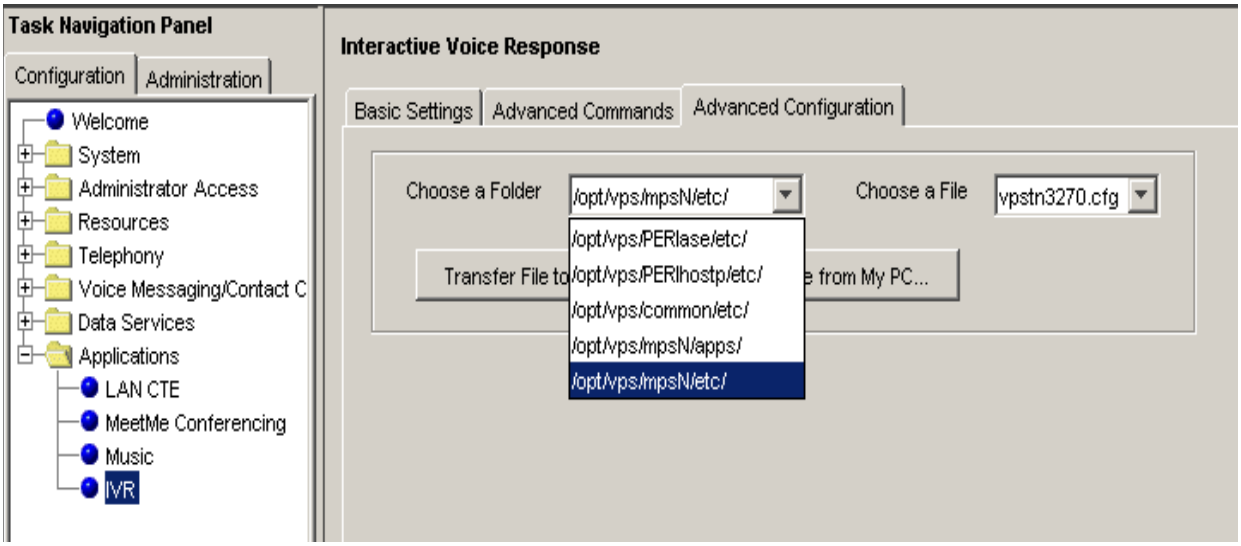
The Element Manager opens, showing the Task Navigation Panel.

2 From the **Configuration** tab, open the **Applications** folder.

3 Click **IVR**.

The Interactive Voice Response panel appears with the Basic Settings tab showing.

4 Select the **Advanced Configuration** tab.



5 From the **Choose a Folder** pull-down list, select the folder from which you want to retrieve a a file to edit.

The files available in the selected folder appear in the Choose a File pull-down list.

6 From the **Choose a File** pull-down list, select a file to edit.

7 Click **Transfer File to My PC**.

The file transfers to your PC, where you can now configure it.

8 When you finish editing the file, close the file.

9 From the **Advanced Configuration** tab in Element Manager, select the folder and file you are replacing.

10 Click **Transfer File from My PC**.

A window opens in which you can specify the path to the configured file.

11 Use the **Look In**, **File Name**, and **File Type** fields to specify the path on your PC to the configured file.

12 Click **Open**.

The file transfers from your PC to the folder you selected in the Choose a Folder pull-down list.

Backing up and restoring IVR

You can protect your IVR files by backing them up using the Backup and Restore utility (BRU). IVR service stops during a backup and restore. For more information on back up and restore activities, refer to the *BCM 4.0 Administration Guide*.

IVR logs

All BCM logs, including logs for IVR, are generated by Element Manager. All IVR logs are captured as diagnostic logs, except for the CTI interface logs, which are captured as sensitive logs. For details and procedures on how to manage, retrieve, and view logs from the BCM, see *BCM 4.0 Administration Guide.*

For information about reports, refer to the *PeriReporter User's Guide* and the *BCM -IVR Integration Supplement*.

IVR guides

You can download IVR documentation from the BCM web page.

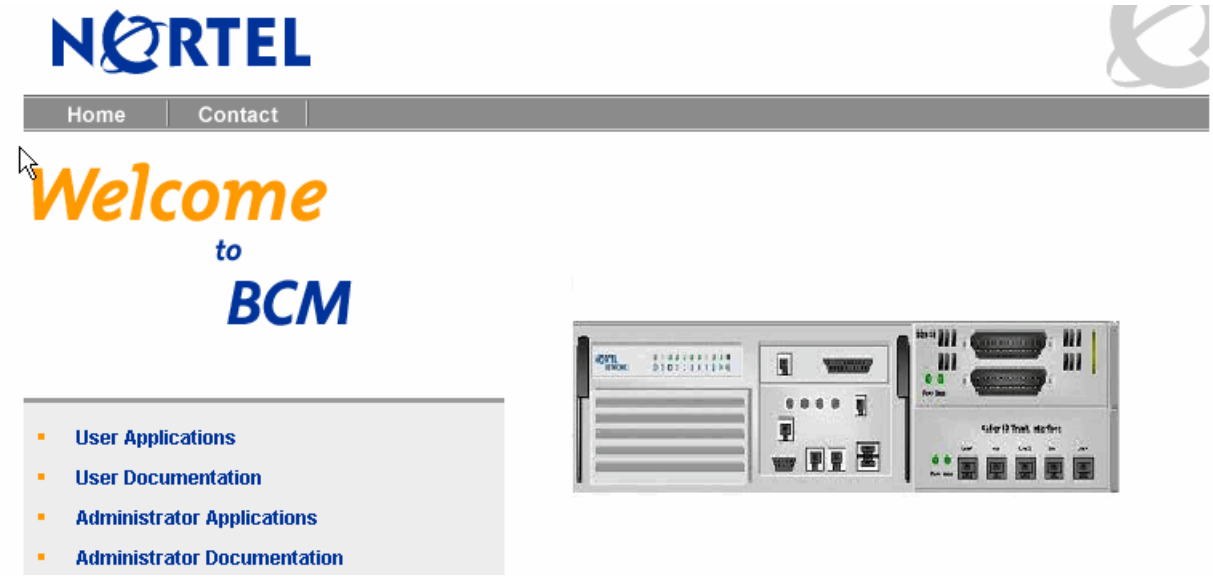
To find IVR guides

1 Open the BCM web page at http://<bcmip>

where

bcmip is the IP address of your BCM.

The Welcome to BCM web page appears.



2 Click **Administrator Documentation**.

3 From the list, click **IVR**.

The IVR documentation list appears. The technical and User Documentation page appears.

4 Click the title of the IVR document you want to view.

The document opens.

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